DataSplice® Mobile Computing

Remote Client User Manual

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Introduction

Purpose

This document is designed as a guide to the set of views for the DataSplice Remote Client application. This guide is intended to provide a general set of instructions for how each DataSplice view is intended to be used and how each of the views functions.

Version Information

The information in this document is valid and current with DataSplice version **4.0**.

User Interface

Toolbar

The toolbar in the Remote Client contains a variety of capabilities.

Icon	Name	Purpose
	Display Home Screen	Returns Back to the Main View Selection screen
	Save Changes	Saves the pending record changes.

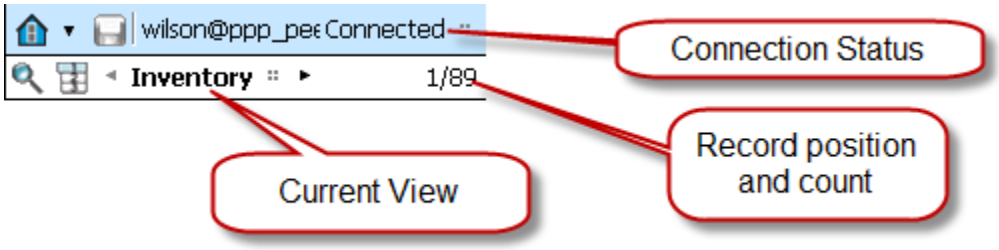
Filter Toolbar

The last few items on the toolbar are context-sensitive to the current screen being displayed. As such, when looking at the filter screen of a view, the following toolbar items are available:

Icon	Name	Purpose
	Clear Filter	Blanks out the criteria presently in place for the currently-selected filter item.
	Insert New Filter Item	Creates a new filter entry immediately below the currently-selected one.
	Delete Filter Item	Deletes the currently-selected filter item.
	Display View Selection	Displays the Home Screen
	Save Changes	Saves the pending record changes.
	Search Screen	Displays the Search Screen
	Data View	Toggles Between Grid View and Single Record

Data Grid & Single Record Toolbar

The last few items on the toolbar are context-sensitive to the current screen being displayed. As such, when looking at the data grid or single record screen, the following toolbar items are available:



Icon	Name	Purpose
	Display View Selection	Displays the Home Screen.
	Save Changes	Commits the pending record changes to the server.
	Search Screen	Displays the Filter Screen
	Data View	Toggles Between Grid View and Single Record

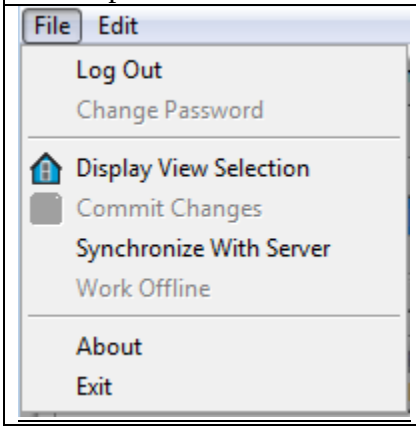
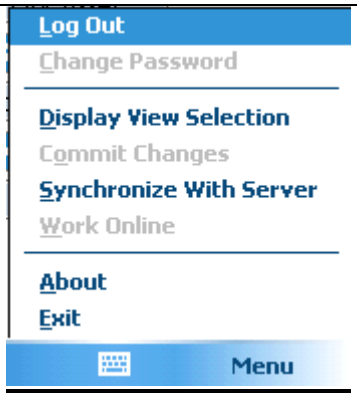
Connection Status Menus

Displays the available options based on the current user's session status. When the current status is ***Connected***, the user can select ***Synchronize with Server*** and ***Log Out***. When the status is currently Online, user's can select ***Synchronize with Server***, ***Work Offline***, and ***Log Out***. When the status is currently Offline, user's can select ***Synchronize with Server***, ***Work Online***, and ***Log Out***.

Menus

The main menu bar of the Remote Client contains many useful features. It will display the different options available on each screen.

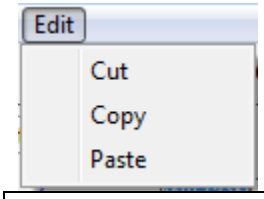
File Menu

Desktop	Hand-held
	

Menu Item	**Purpose**
Log Out	Logs out of the Remote Client. After the current user is logged out, the login dialog box is displayed again.
Change Password	Displays the Change Password dialog box to allow users to change their passwords. Note: **In order for the password change to take effect, the current password must be entered correctly, and the** New Password **and** Confirm Password **fields must match.**
Save Changes	Saves pending changes. When working offline, these changes are still cached locally on the device until a synchronization is performed.
Synchronize With Server	Updates Remote Client information with the latest information on the DataSplice Server. Allows the handheld in the cradle to communicate with the DataSplice Server to commit any pending modifications and update schema information.
Work Online	Connects in order to work in an offline mode. This option is only available when the handheld is in the cradle and a connection has been established with the DataSplice Server.
About	Opens the About dialog box and provides basic file information and loaded plug-in information. By default, the dialog box will display file information. Loaded Plug-ins can also be selected from the Section drop-down list to see the corresponding plug-in information.

Exit	Logs out and closes the Administration Client.

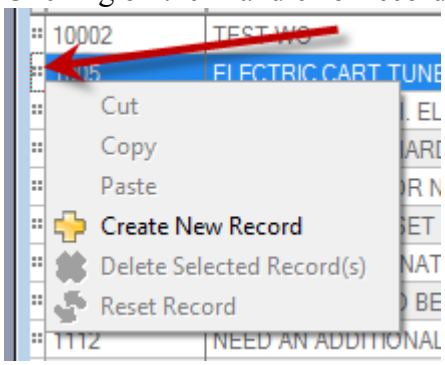
Edit Menu (Desktop)



Menu Item	Purpose
Cut	Removes the selection from its current location and places it on the system clipboard.
Copy	Places a copy of the selection onto the system clipboard.
Paste	Inserts the contents of the system clipboard into the current selection.

Record Menu

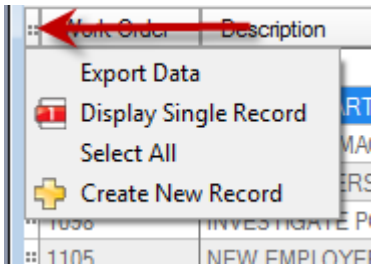
Clicking on the "handle" of record in the data grid display will open the record menu.



Icon	Menu Item	Purpose
	Cut	Removes the selection from its current location and places it on the system clipboard.
	Copy	Places a copy of the selection onto the system clipboard.
	Paste	Inserts the contents of the system clipboard into the current selection.
	Create New Record	Creates a new record immediately following the currently selected record.
	Delete Selected Record(s)	Deletes the selected record(s).
	Reset Record	Resets the selected record back to the original state before edits were made.

Grid Menu

Clicking or tapping on the “handle” in the upper left corner of the data grid will open the Grid Menu.

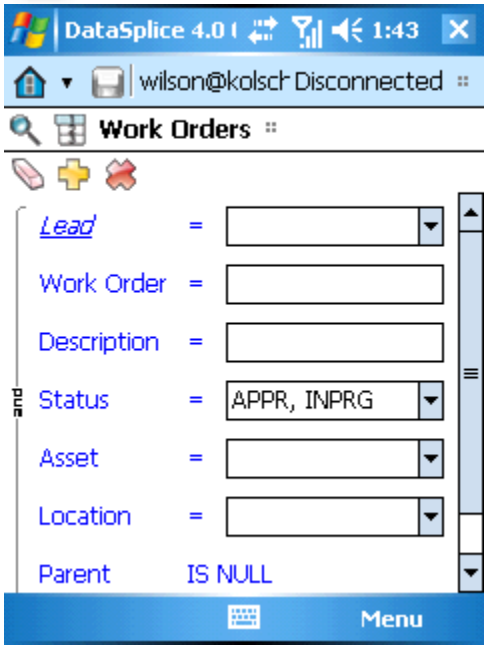


Icon	Menu Item	Purpose
	Export Data	(Desktop Only) Exports the contents of the data grid to a *.csv file.
	Display Single Record / Display Data Grid	Toggle the current display mode between single record display and data grid.
	Select All	Used to “select” all of the records in the data grid.
	Create New Record	Will insert a new row of data immediately following the currently selected row.

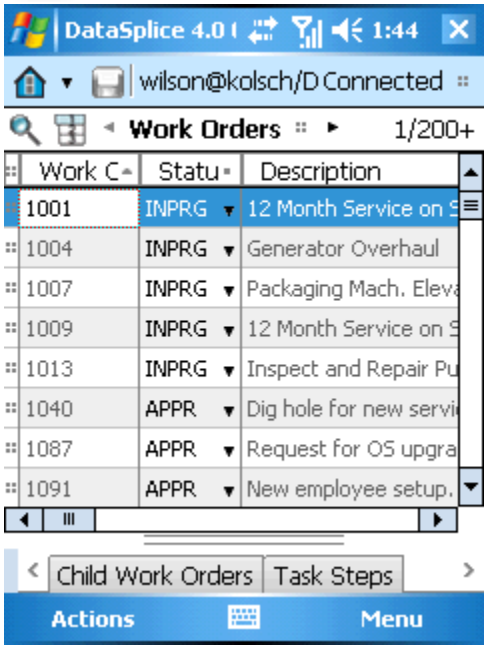
Navigating to Filter, Grid, or Single Record Display

Views can be seen in three different states. The different navigation entries to access each of these states are as follows:

Display Filter Icon - Tapping this icon shows the default filter for the view. An ***** or a **%** acts as a wildcard in any search.



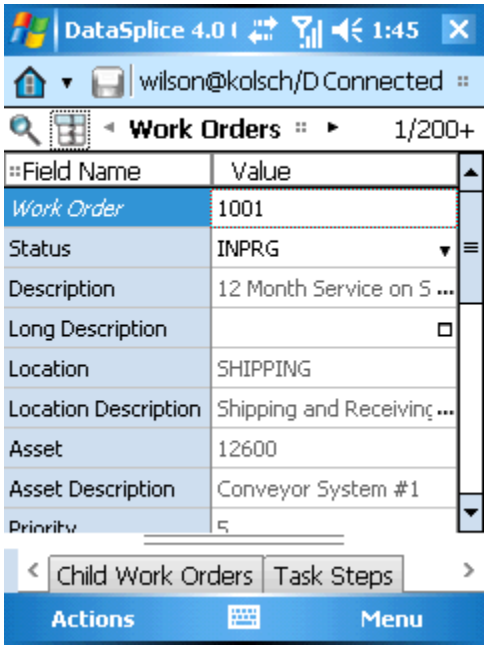
Display Data Grid Icon - Tapping this icon shows multiple records from the recordset.

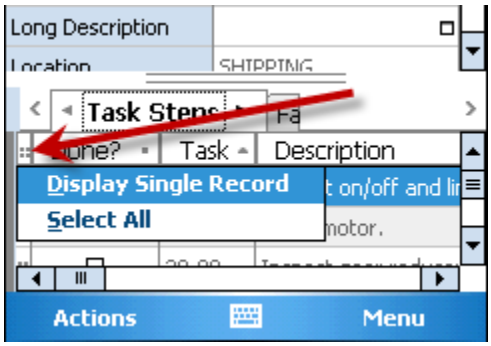


Use the **scrollbar** at the bottom of the grid to view the details of each record.

Click on the ellipses (…) to view a truncated line.

Display Single Record Icon - Tapping this icon shows only one record from the recordset.

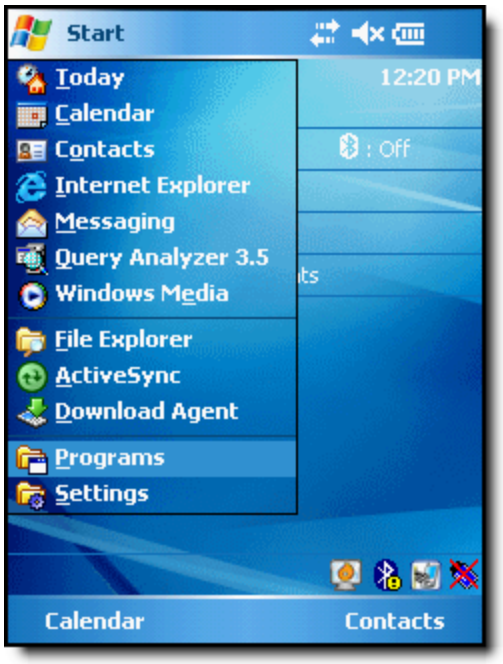




Use the data grid "handle" to open the grid menu when accessing the data in the detail tabs.

Launching the DataSplice Remote Client

To begin, the DataSplice Remote Client application needs to be launched.



Place the handheld in the cradle.
Click **Start.**
Select **Programs**.

In the resulting Programs menu, tap the **DataSplice 4.0** icon.

The application will be launched and the login dialog box will be displayed.

Beginning a Session

Depending on the steps previously taken, the behavior for working with a session may vary. For example, if the user has not yet been authenticated from a previous session, the initial login dialog box is displayed. The user must then log in using the correct credentials to connect to the DataSplice Server and be authenticated appropriately. In contrast, if the user has previously been authenticated, the list of available views will be displayed upon launching the application, although the user is still not connected at this time. Any action in the application that requires a query of information from the DataSplice Server will attempt to automatically reconnect.

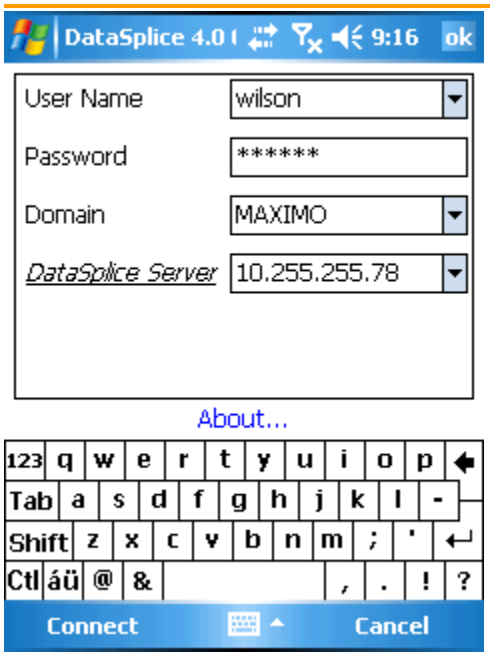
Logging In

If this is the first time accessing the Remote Client, or if the previous session was successfully logged out, the user will be required to log in to obtain a new session.

To log in to the DataSplice Remote Client:

- Launch the Remote Client.
- In the resulting dialog box, enter the appropriate login information, keeping in mind that all entries are case-sensitive.

Field Name	Description
User Name	The unique login name for this user.
Password	The password corresponding to the unique user name in the previous field.
Domain	The domain that this user belongs to. If the desired entry does not show up in the drop-down list, it can be typed directly into the drop-down field. After a successful login attempt, the domain that was entered will remain in the drop-down list for future use.
DataSplice Server	The computer name or IP address of the machine running the DataSplice Server. If a port other than the default, *4100*, is being used, it should be specified with a colon and the port number immediately following the server name or IP address. For example, if the server is named test and the DataSplice Server is configured to listen on port *4101*, the value should be entered as *test:4101*.



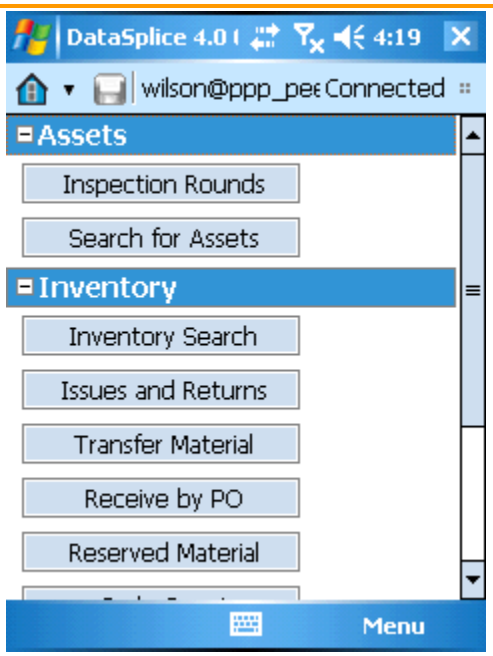
- Click the **Connect** menu button to continue. If the **Cancel** button is clicked, the user will not be authenticated, and the Remote Client application will automatically close.
- The Remote Client will attempt to authenticate and connect with the given information. The behavior to follow depends on the settings of the **Offline Behavior** attribute, as described in the following sections.

Reconnecting an Existing Session

If the user has previously been authenticated and has not since logged out, the list of available views will be displayed upon launching the application, although the user is still not connected at this time.

To reconnect with an existing session:

- Launch the Remote Client.
- The home screen will be displayed, showing the list of available views. Remember that, at this time, the connection to the DataSplice Server has not yet been re-established.



- Perform any action in the Remote Client application that requires a query of information from the DataSplice Server, such as querying data in a view, attempting to synchronize with the DataSplice Server, etc.
- The Remote Client will attempt to automatically reconnect to the DataSplice Server.

Offline Behavior

When Offline Behavior is Defined as Never Offline

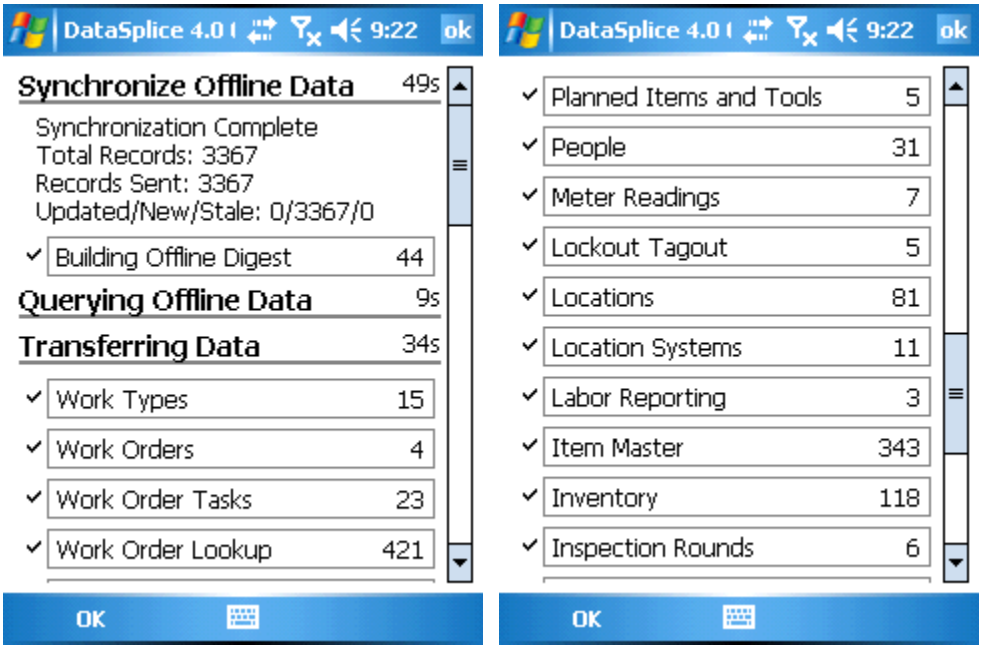
If the **Offline Behavior** attribute in the DataSplice Administration Client has been defined as *Never Offline,* it is not possible to cache offline data onto the Remote Client device. For the same reason, it is also not possible to obtain an offline session in this scenario. Please see the explanation of built-in system attributes for more information about this attribute setting.

When Offline Behavior is Defined as Always Offline

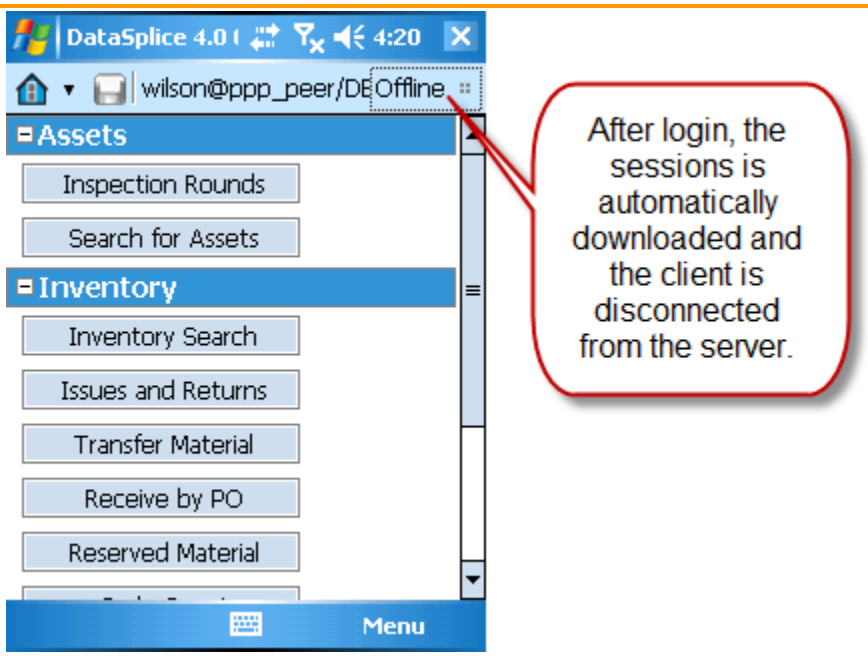
If the **Offline Behavior** attribute in the DataSplice Administration Client has been defined as *Always Offline*, the caching of offline data will be automatically performed during any login or synchronization process. In addition, the user always has an offline session, even if the user is still *connected* to the DataSplice Server. This offline session will remain until it is released by logging out of the Remote Client or it is revoked by an administrator in the Administration Client. Please see the explanation of built-in system attributes for more information about this attribute setting.

To acquire offline data when the Offline Behavior attribute is defined as Always Offline:

- Launch the Remote Client.
- Log in with the credentials of a user who has offline behavior defined as *Always Offline*.
- Offline data will automatically be cached onto the Remote Client device, during which time a status dialog box will be displayed.



- Click **OK** to close the dialog box when the offline data has finished loading on the device.
- The home screen will be displayed, showing the list of available functions.



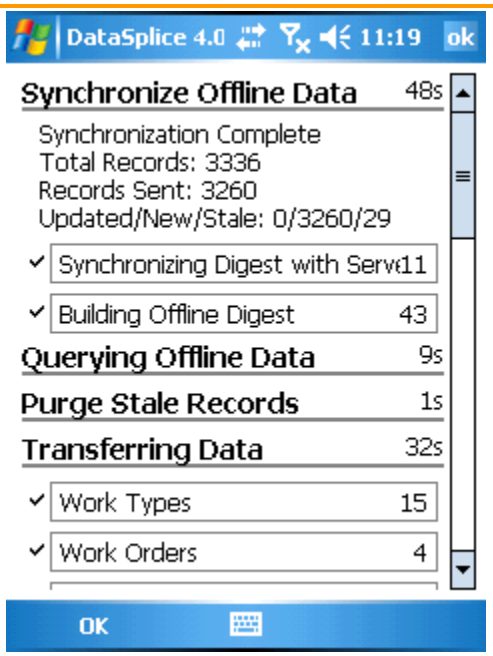
- Because of the *Always Offline* setting, the application will immediately assume the device is disconnected as soon as the synchronization process finishes. Thus, as soon as the offline data is loaded on the device, it is ready to be used in an environment without network connectivity.

Acquiring Offline Data when Offline Behavior is Undefined

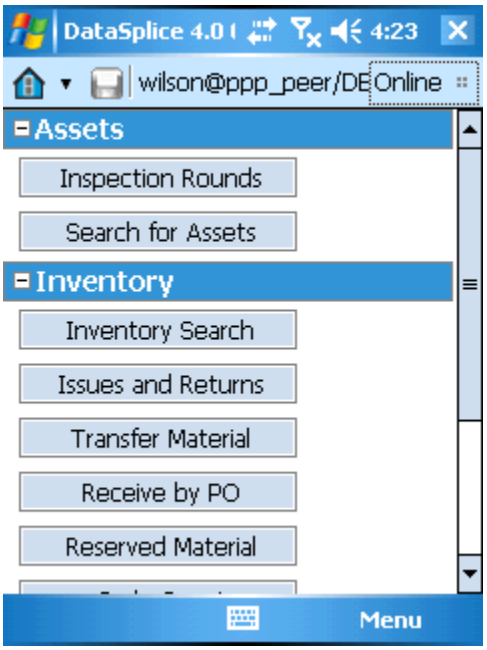
If the **Offline Behavior** attribute in the DataSplice Administration Client has not been defined, the ability to acquire offline data is available to the user but it requires the synchronization process to be explicitly invoked. Once a synchronization has been performed in this scenario, the user will have an offline session, even if the user is still *connected* to the DataSplice Server. Please see the explanation of built-in system attributes for more information about this attribute setting.

To acquire offline data when the Offline Behavior attribute is not defined:

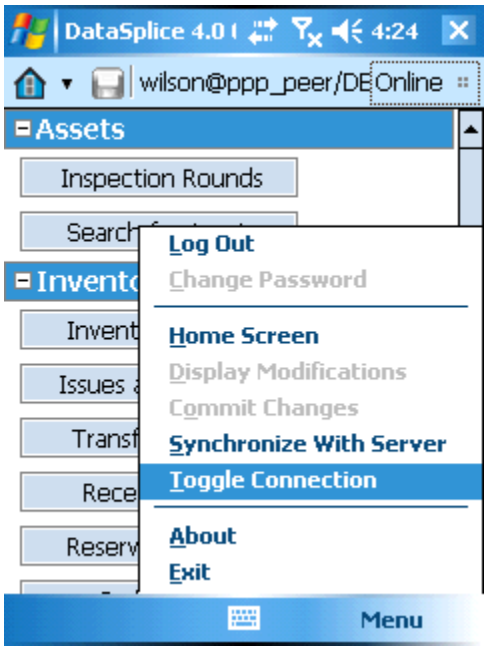
- Launch the Remote Client.
- Log in with the credentials of a user who has undefined offline behavior.
- Upon successful login, tap **Menu** > **Synchronize with Server**.
- Offline data will be cached onto the Remote Client device, during which time a status dialog box will be displayed.



- Click **OK** to close the dialog box when the offline data has finished loading on the device.
- The home screen will be displayed, showing the list of available views.



- Click **Menu** > **Toggle Connection** to disconnect from the DataSplice Server and begin using the stored offline data.



Completing a Session

When all of the desired tasks of a session have been performed, the current session should be properly completed. This process releases the session, which also ensures that all licenses being consumed by the session are freed up and made available for additional sessions. The process of completing a session differs depending on whether an online or offline session is being used.

Completing an Online Session

To complete an *online* session, it is necessary to either log out or exit the Remote Client application. Because the session is online, performing either of these actions will immediately release the session in use.

To complete an online session, perform one of the following step:

- Click **Menu** > **Log Out**.

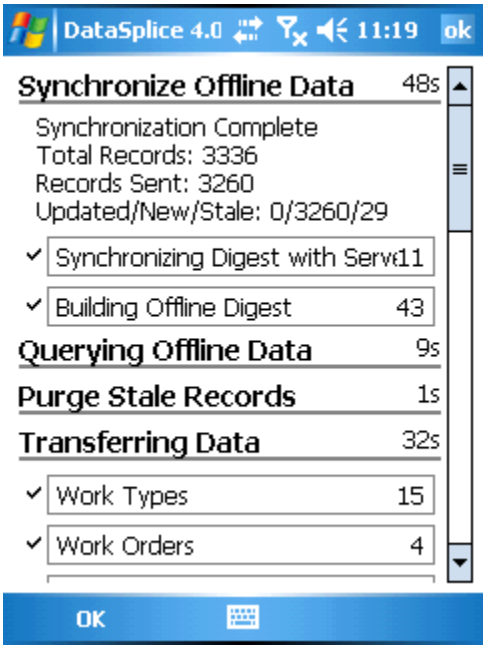
Note: Closing the Remote Client application by using the button in the upper right corner of the screen on a Windows Mobile device will not release the session. Rather, the application will still be running in a minimized state.

Completing an Offline Session

Due to the nature of *offline* sessions, there are a few more scenarios that may be encountered. As such, the process of completing an offline session is slightly more involved. It is important to remember that, during an offline session, all of the pending modifications are stored on the Remote Client device, not on the DataSplice Server. To successfully complete the session, any modifications must be committed to the DataSplice Server and the session must be released properly.

To synchronize data and continue working in the existing session:

- Ensure that a valid network connection is active, with visibility of the DataSplice Server.
- Click **Menu** > **Synchronize with Server**.
- All pending record modifications will be committed to the DataSplice Server. In addition, the system will be queried for any new or updated records to cache offline on the Remote Client device.
- During the synchronization process, a progress dialog box will be displayed.

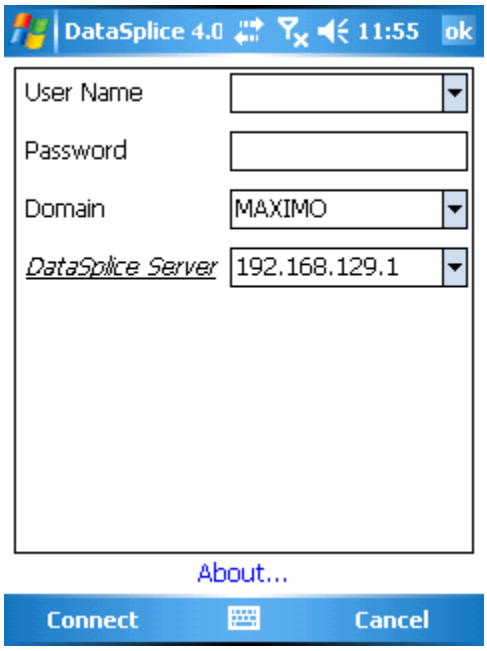


- Click **OK** to close the dialog box when the offline data has finished loading on the device.
- Click **Menu** > **Work Offline** to disconnect from the DataSplice Server and begin using the stored offline data.

To synchronize data and release the offline session:

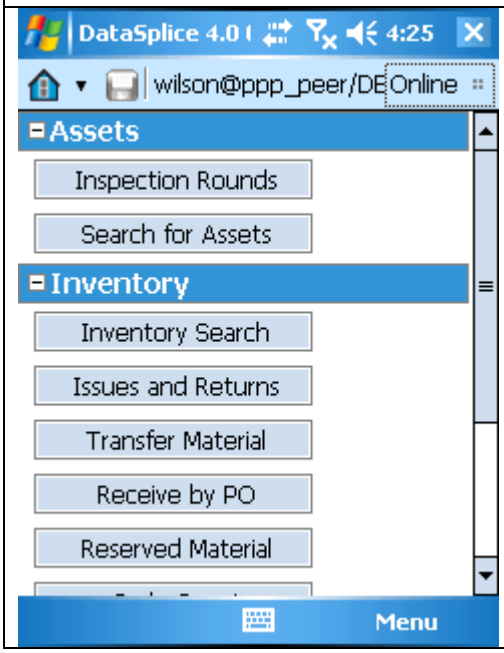
- Ensure that a valid network connection is active, with visibility of the DataSplice Server.

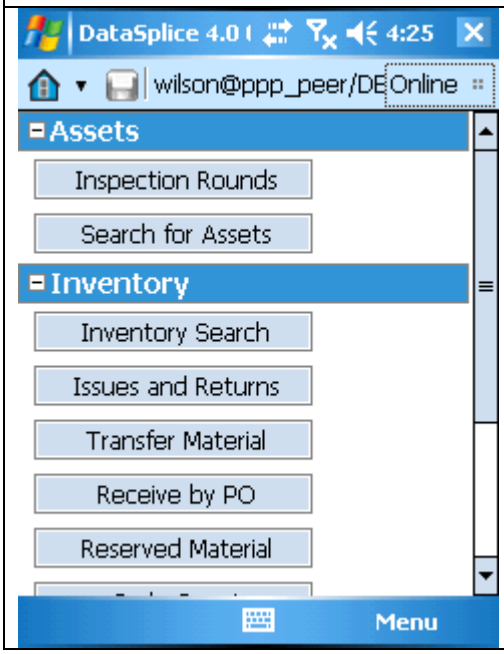
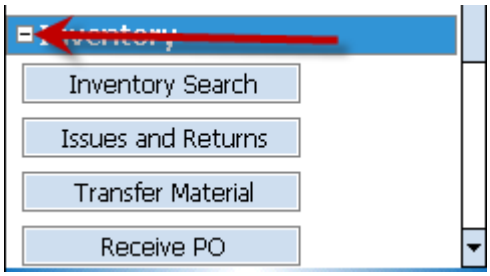
- Click **Menu** > **Log Out**.
- All pending record modifications will be committed to the DataSplice Server.
- Once complete, the user will be logged out and the session will be released, returning the Remote Client application to the login screen.



Home Screen

After you have successfully logged in, you will be presented with the home screen.

Default View	
	DataSplice will display the list of all available functions. The list contains all of the DataSplice inventory views (screens) that you have access to based on your user login. To access a particular view, tap on the button with your stylus, or highlight it using the tab key on the handheld and press the "Enter" key. To return to the home screen, tap the **Home Screen** button .

All Available Views	
	You may, at any time, scroll through the list of all available functions. Each Category can be expanded or collapsed using the ⊞ or ⊟ buttons in the category header. 

Assets

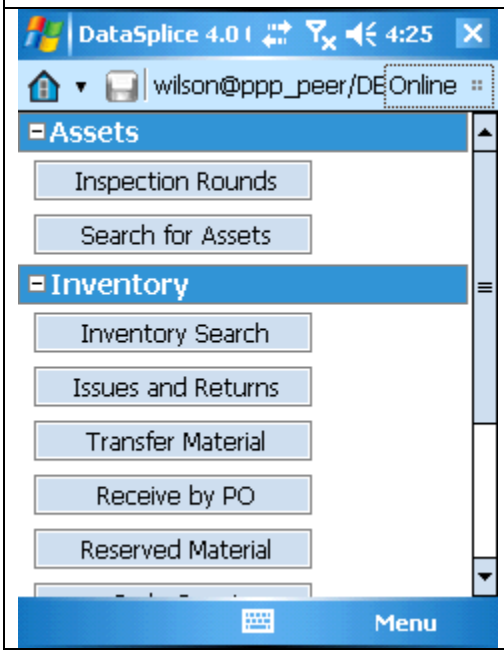
Description

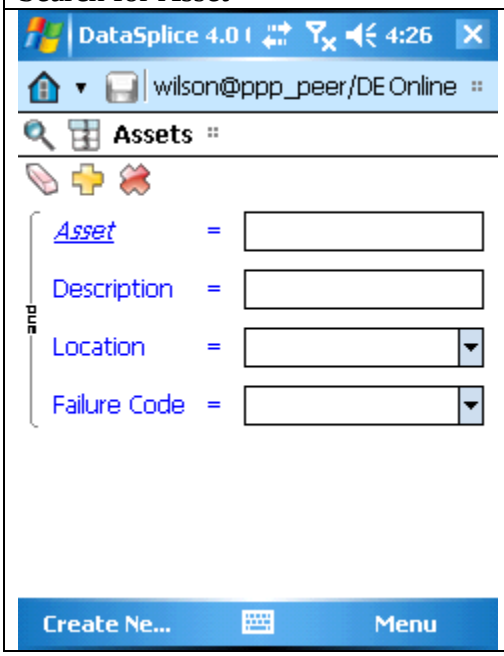
The Assets mobile screen provides the user with the ability to search on, modify, and create new asset records. In addition to standard asset updates, the user can view and modify asset specifications, meter readings, work history, and spare parts.

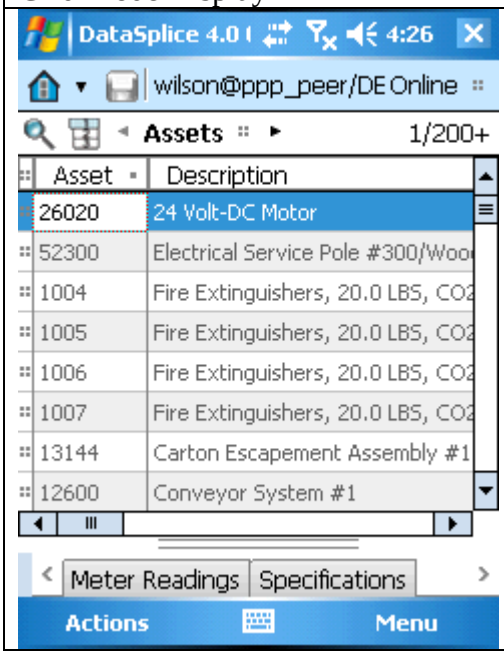
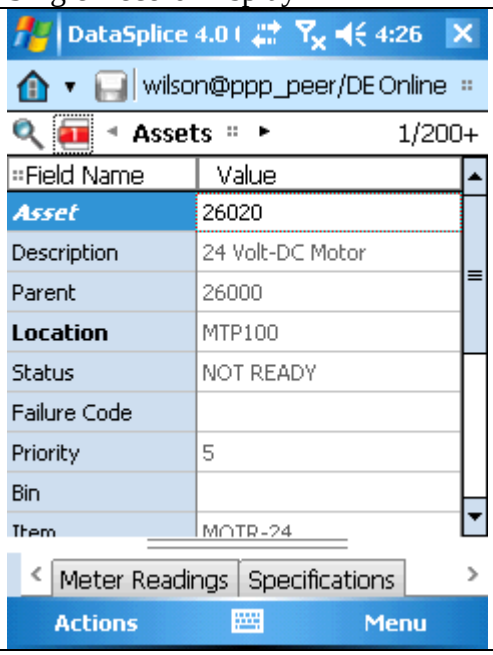
Fields

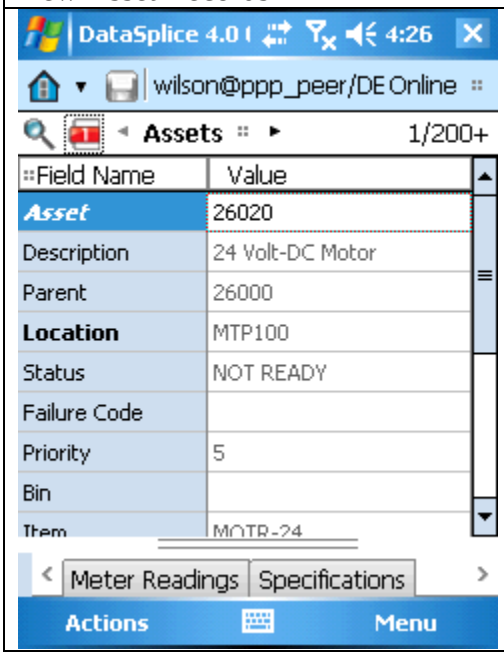
Field Name	Description
Asset	The Maximo Asset Number
Description	The description of the asset
Parent	The parent asset, if this asset is a child.
Location	The location identifier for this asset
Status	The asset's status; NOT READY, OPERATING, etc..
Failure Code	The asset's failure classification
Priority	The priority for the asset. Helps to determine which assets should be worked on first.
Bin	The bin location of the asset, if it is a rotating item in inventory.
Item	The item number of the asset, if it is a rotating item in inventory.
Serial Number	The serial number of the asset
Asset Tag	The Asset's tag identifier
Vendor	The vendor code from where the asset was purchased
Manufacturer	The manufacturer's code (not the same as name)
Install Date	The date the asset was installed
GL Account	The general ledger account for the asset
Class Structure ID	The class structure identifier. Specifies the hierarchy of attributes associated with the asset
SiteID	The SiteID of the asset.

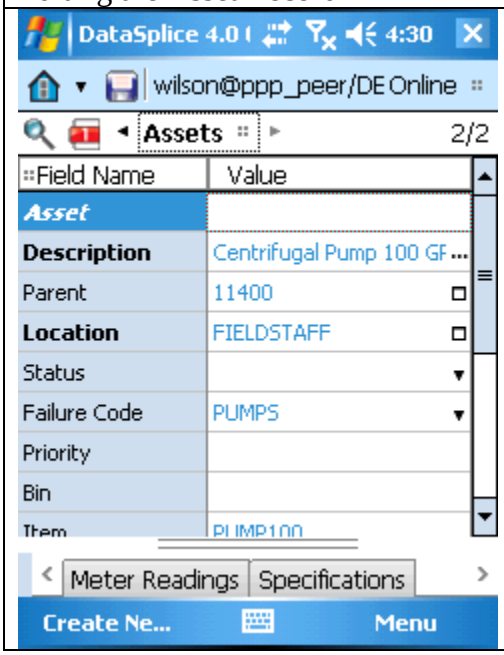
Using the View

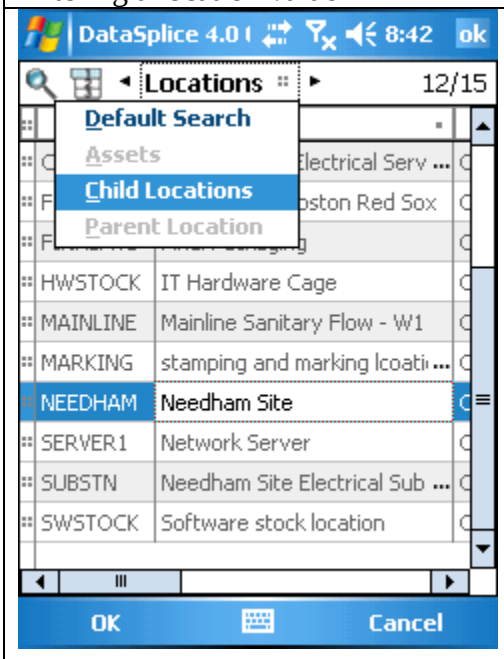
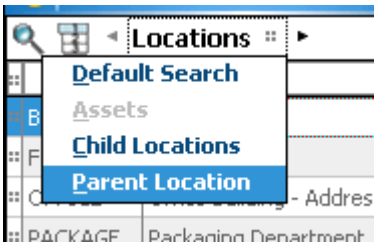
Assets	
	To access the **Assets** mobile screen, tap on the ***Search for Assets*** button on the Home Screen.

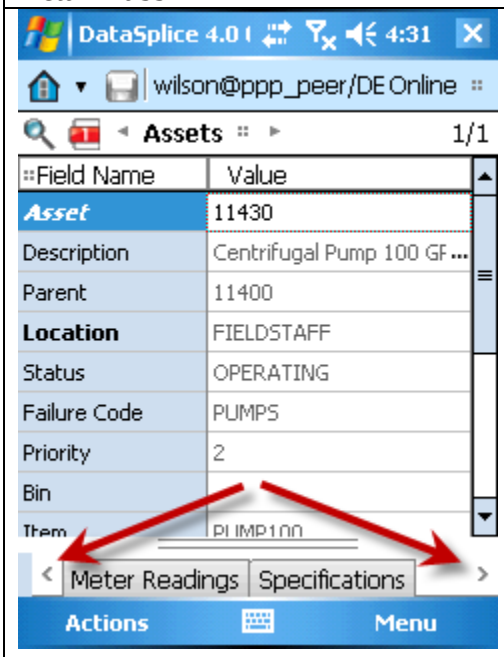
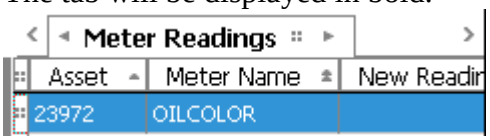
Search for Asset	
	The Asset's filter screen initially displays a predefined filter for searching for assets. Key in, or scan, the desired values to search on then hit the "Enter" key. Optionally, you can tap on either of the display mode toolbar buttons: Display results in Grid Mode. Display results in Single Record Mode.

Grid Mode Display	Single Record Display
	

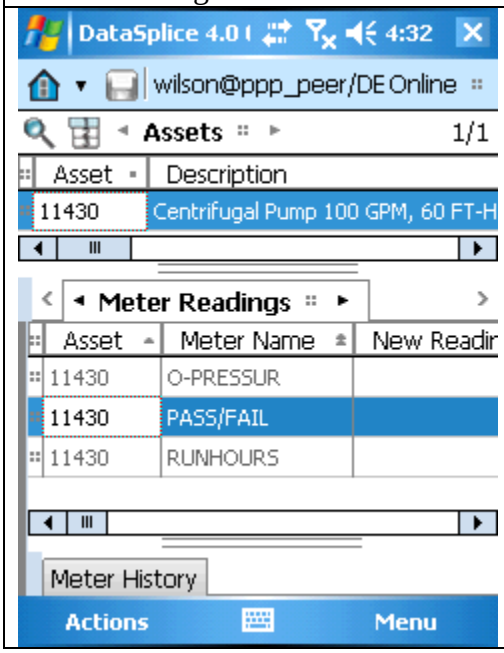
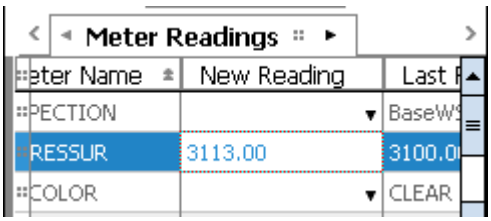
New Asset Records	
	The Assets screen supports the creation of new assets provided the user has the rights to do so in Maximo. To create a new asset, tap the Actions menu and select; 1. Create Copy of Asset – to duplicate an asset record. 2. Create New Asset – to create new asset record that the user will complete.

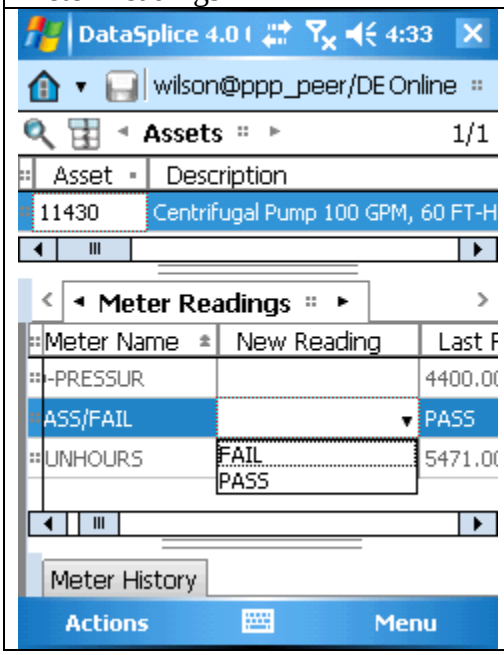
Editing the Asset Record	
	If the "Create Copy of Asset" option is used, the new record will default with the values from the selected asset. Otherwise, the user can enter the desired values for the new record.

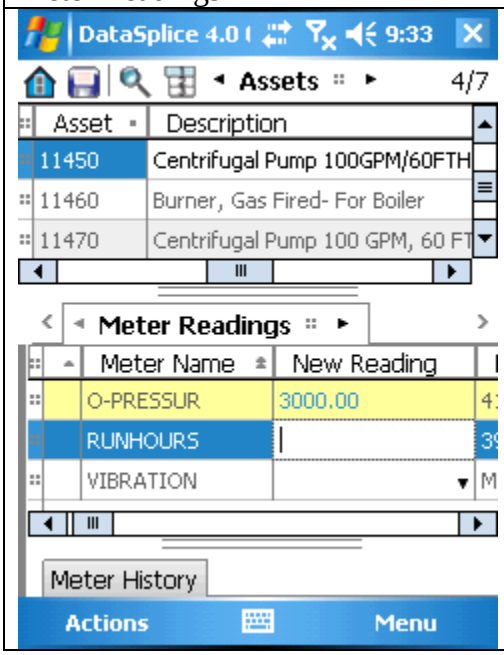
Entering a location value	
	When selecting a location value, the pop-up value grid provides menus for navigating the hierarchy. Use the **Child Locations** navigation menu to move down the hierarchy of locations. Use the **Parent Location** menu to move up.  Additionally, the location value can be scanned in as well.

Detail Tabs	
	Users can access the detailed data for the selected asset by tapping on the arrow keys on either side of the client display screen. The different tabs will be displayed. Tap on a particular tab to select it. 1. Meter Readings 2. Specifications 3. Custodians 4. Spare Parts 5. Work History The tab will be displayed in bold. 

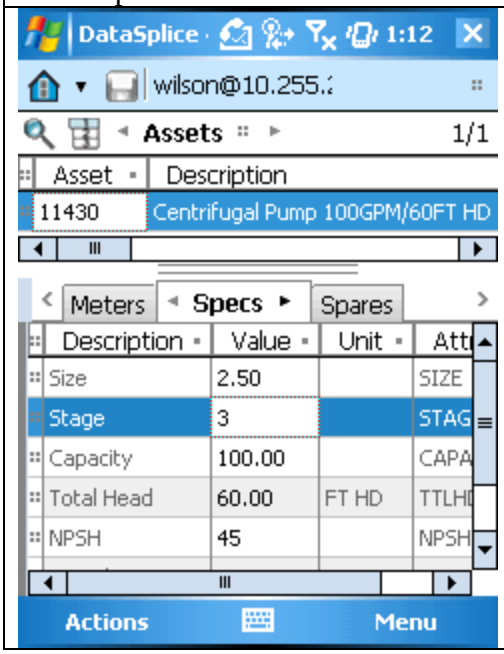
Meter Readings

Meter Readings	
	The Meter Readings tab allows the user to view the meters associated with the asset and enter new meter readings. To enter a new reading, place focus in the corresponding “New Reading” field, for the correct row, and enter the desired value. 

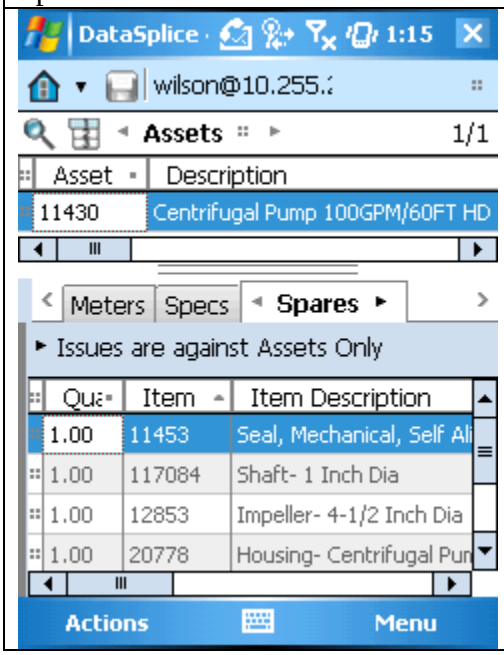
Meter Readings	
	Characteristic meters, or meters with a domain value list, will have a drop-down value selection available.

Meter Readings	
	New gauge readings, that are out of range of the defined limits, will be displayed with a darker background color. This visual cue is to alert the user to an “out-of-bounds” condition for the new reading.

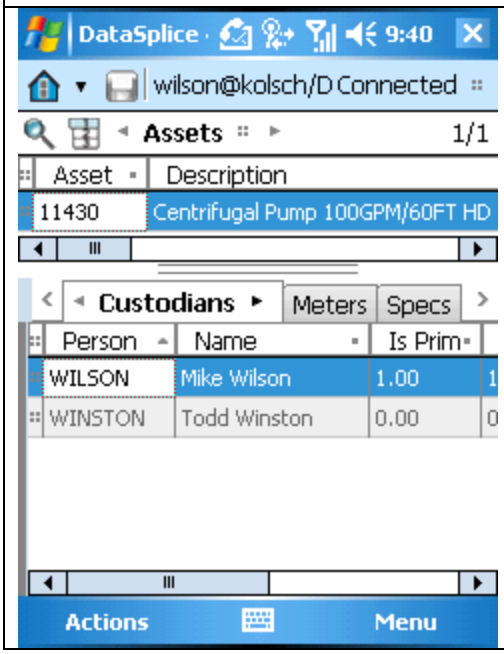
Specifications

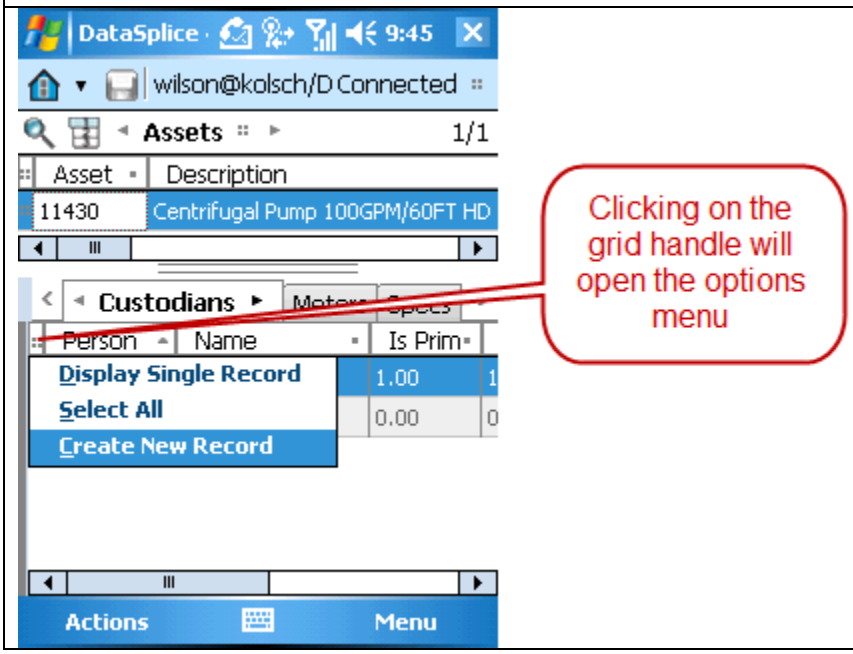
Asset Specs	
	The Specifications tab allows the user to view and update asset specification values. The Value field can modified, if the user has the rights to update asset data. If there is a domain value list associated with the selected specification, a drop-down will be available to pick from. Otherwise, the user can key-in the correct numerical or text based value.

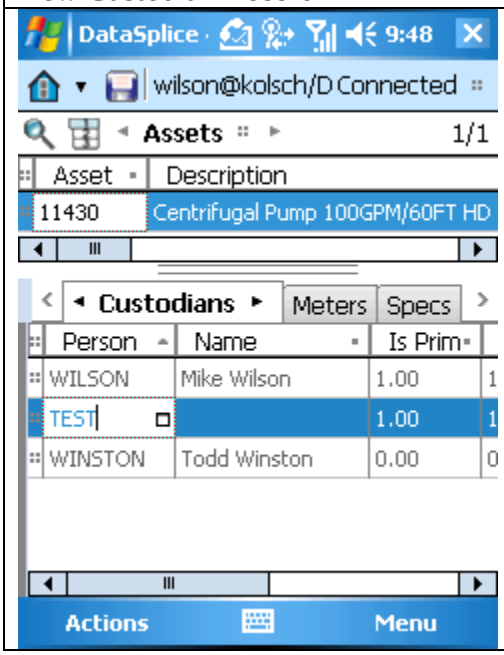
Spare Parts

Spare Parts	
	The Spare Parts tab displays the list of items that have been defined as spare parts, for the selected asset.

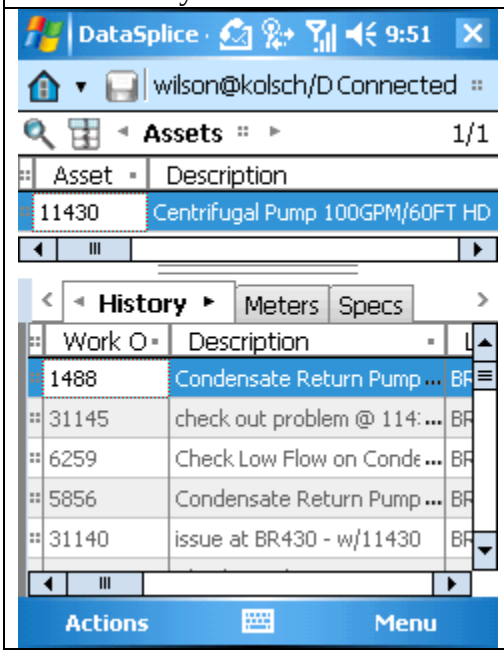
Custodians

Custodians	
	The Custodians tab allows the user to view the associated custodian information for the selected asset.

New Custodian Record	
	If the user has the rights to update this information, they will be able to create new entries for additional (or new) custodian records. Use the grid handle, in the upper left corner of the data grid to access and select the **Create New Record** menu option.

New Custodian Record	
	Key-in, scan, or select the Person for the new custodian record.

Work History

Work History	
	The Work History tab is a read-only display of the historical work orders for the selected asset.

Inspection Rounds

Description

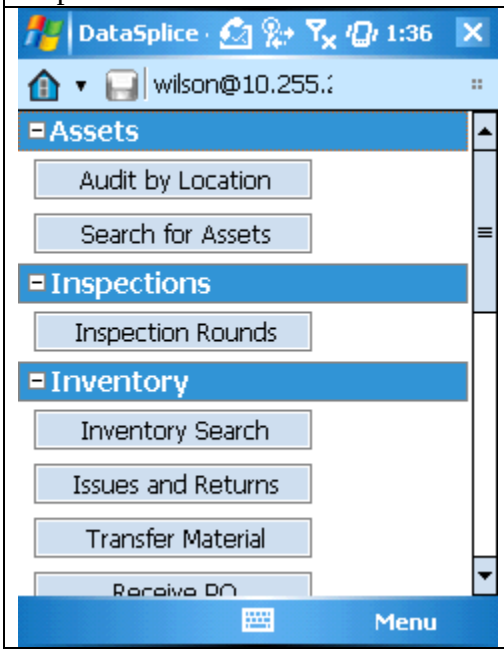
Inspection Rounds is a screen designed to allow the user to easily enter new meter readings by searching on an Asset or Round.

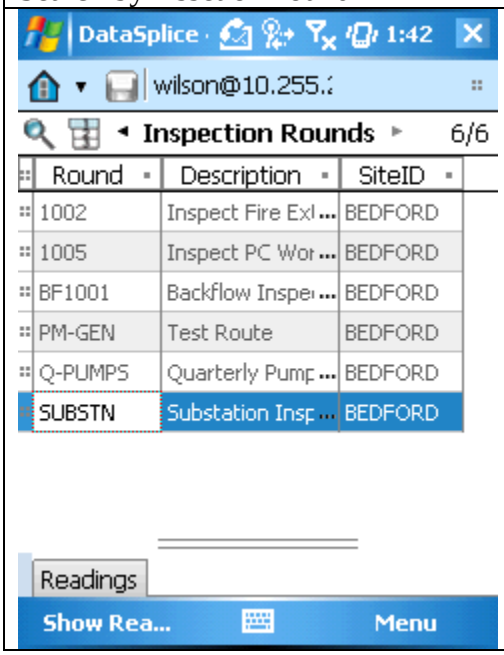
Fields

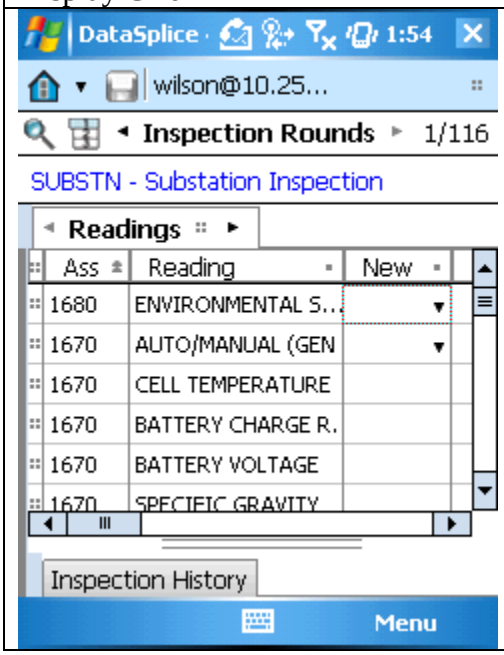
Below is a listing of the fields included in this view.

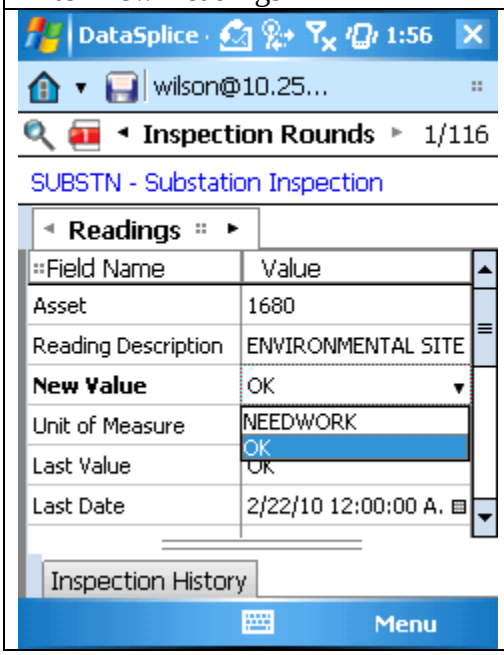
Field Name	Description
Reading Description	The description of the meter reading
Last Value	The value of the last reading taken.
Last Date	The date of the last reading
Unit of Measure	The unit of measure for the meter
Meter Name	The meter name (identifier)
Lower Action	The low limit defined for normal operation of the meter. Readings less than this value require corrective action.
Lower Warning	The low warning defined for normal operation of the meter.
Upper Warning	The high warning defined for normal operation of the meter.
Upper Action	The high limit defined for normal operation of the meter. Readings above this value require corrective action.
Asset	The asset this meter is attached to.
Asset Description	The asset's description
Stop Seq	The sequence number that the meter should be read.
Round	The Round the asset belongs to
Location	The location the asset is at
Point Number	The point number for this meter. Used to define the upper and lower limit for gauge meters.
Meter Type	The type of meter. GAUGE, CONTINUOUS, CHARACTERISTIC
DomainID	The Domain ID that identifies a drop-down value list for meter readings.
SiteID	The Site ID

Using the View

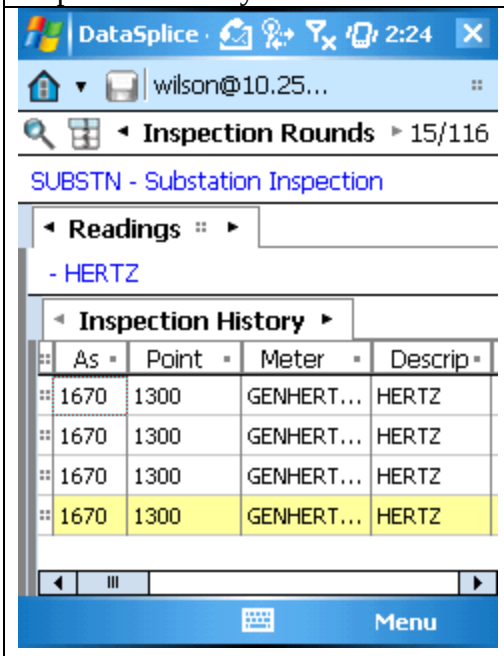
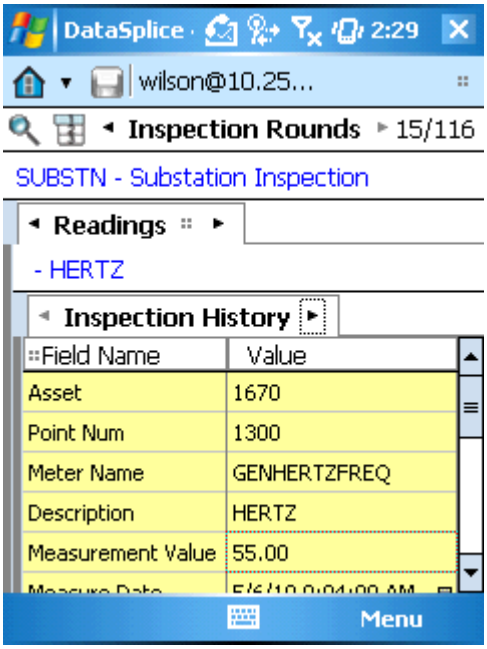
Inspection Rounds	
	To access the **Inspection Rounds**, tap on the ***Inspection Rounds*** button on the Home Screen.

Search by Asset or Round	
	To search for a set of readings, key-in or scan the Asset number. Or, select the desired round from the Round's drop-down list of available values. Once the filter values are entered, hit the "Enter" key. Optionally, you can tap on either of the display mode toolbar buttons: Display results in Grid Mode. Display results in Single Record Mode.

Display Grid	Display Single Record
	

Enter New Readings	
	The results of the search are displayed in Stop Sequence and Point Number order. User can begin entering readings into the "New Value" field. "New Value" fields, with a drop-down arrow, will have a value list to select from. Otherwise, users can perform numerical data entry using the key-pad of the device or the virtual key-pad.

Inspection History

Inspection History	
 History records that are displayed with a yellow background indicate that the reading was "out-of-range".	The Inspection History tab displays the historical readings for the selected meter reading. Use the scroll bar at the bottom of the screen to view additional details. Or, use the grid menu to display the data in single record mode. 

Inventory

Description

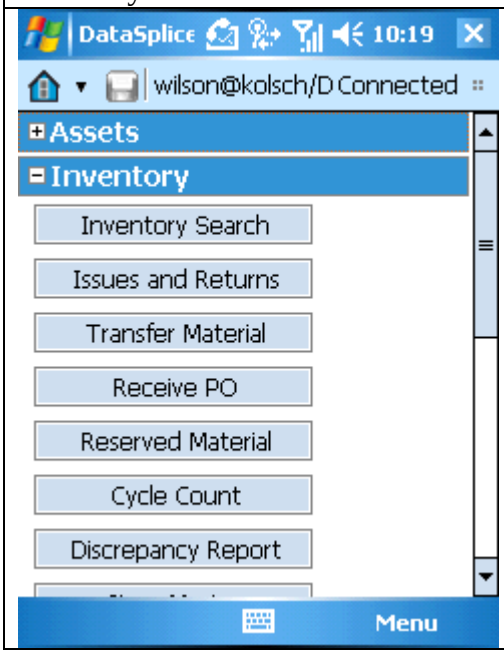
Inventory is a view designed for looking up inventory items. After a successful search on an item, users can perform counts, transfers, issues, etc... for the selected inventory item.

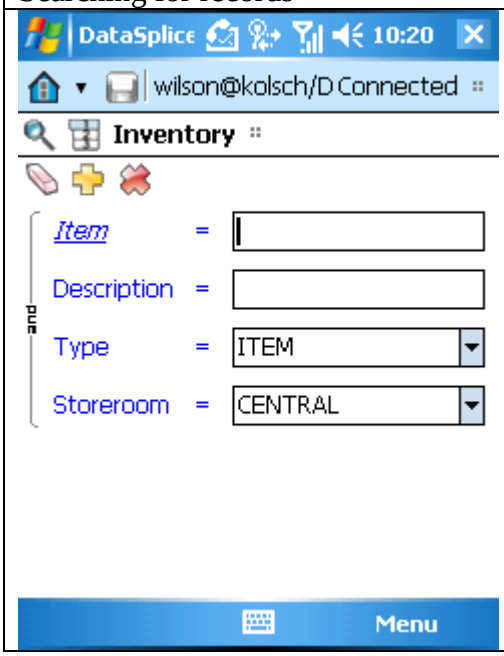
Fields

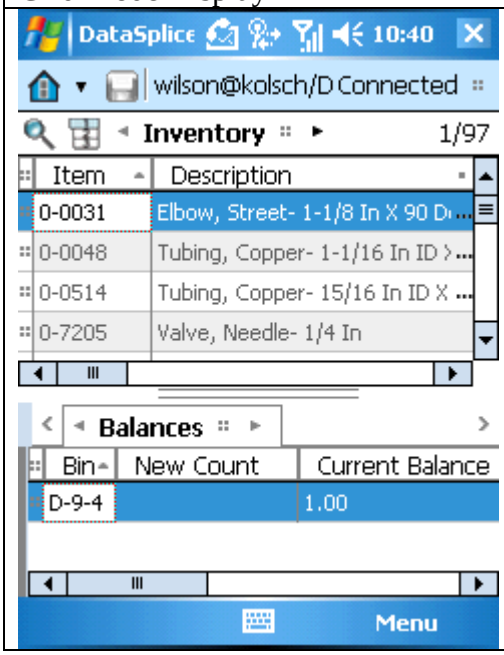
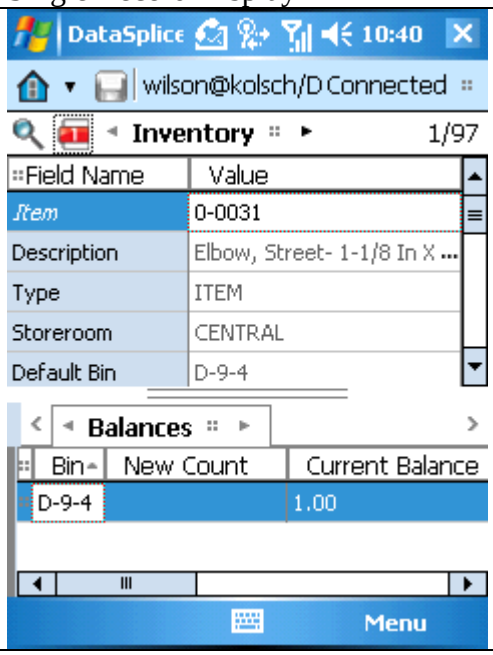
Below is a listing of the fields included in this view.

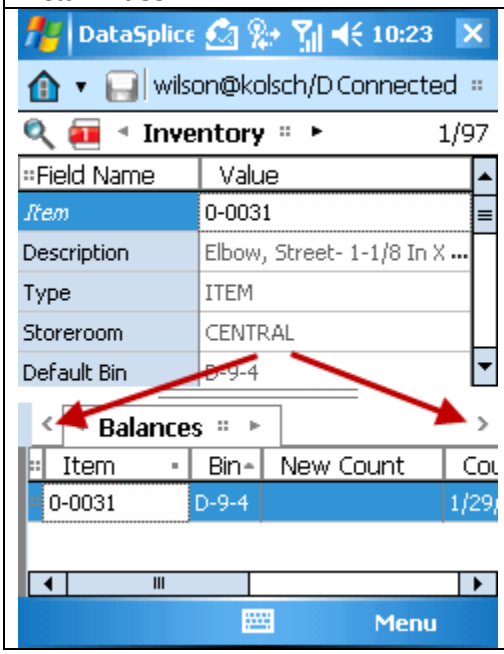
Field Name	Description
Item	The identification number of the item being issued.
Description	The item description.
New Count	Used to enter the value for physical counts.
Last Count	The value of the last physical count.
Current Balance	The current on-hand qty in stock.
Count Date	The date of the last count.
Storeroom	The storeroom location of the item.
Bin	The bin location within the storeroom.
Issue Unit	Unit of Measure for issues of the item.
Catalog Code	Typically vendor part number.
Manufacturer	The item manufacturer.
Model Number	The manufacturer's part/model number.
Vendor	Company the item was purchased from.
Min Level	Minimum stock level.
Max Level	Maximum stock level.
Category	Item category (Stock, Non-stock, Obsolete, etc…)
Rotating	Specifies if the item is a rotating equipment spare.
Reconciled	Specifies if the item's last count has been reconciled.
Count Frequency	The number of days scheduled between each physical count.
ABC Type	Used in conjunction with count frequency. Determines how often to count the item.
Days Until Count	Calculated value. Shows how many days before an item is due to be counted.
Item Type	The type for this record (ITEM, TOOL, STDSERVICE).

Using the View

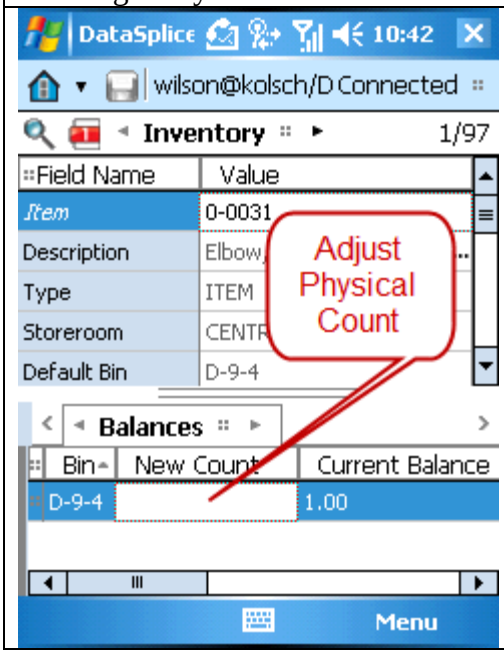
Inventory View List	
	To access the **Inventory Search** screen, tap on the name with the stylus, or highlight the name (using the tab key) and hit the "Enter" key.

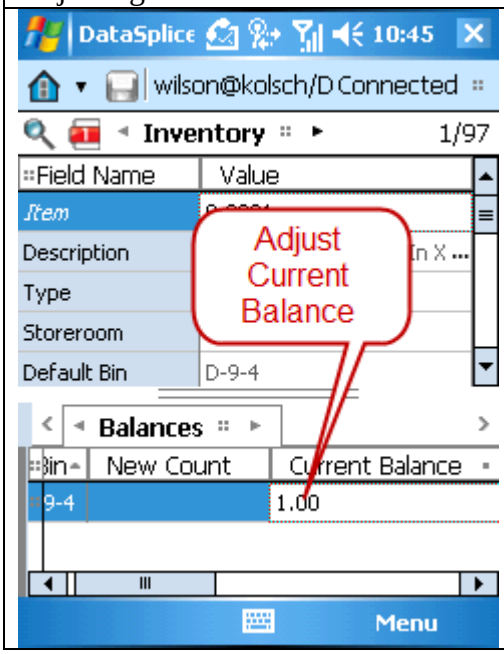
Searching for records	
	The Inventory screen initially displays a predefined filter for searching for inventory items. Key in, or scan, the desired values to search on then hit the "Enter" key. Optionally, you can tap on either of the display mode toolbar buttons: Display results in Grid Mode. Display results in Single Record Mode.

Grid Mode Display	Single Record Display
	

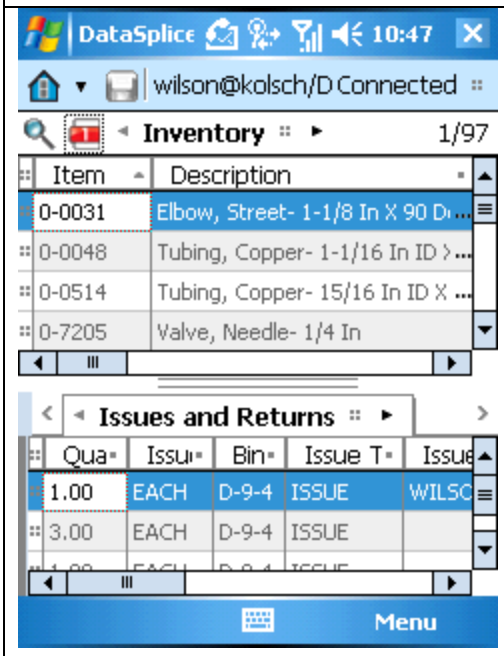
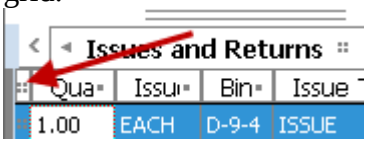
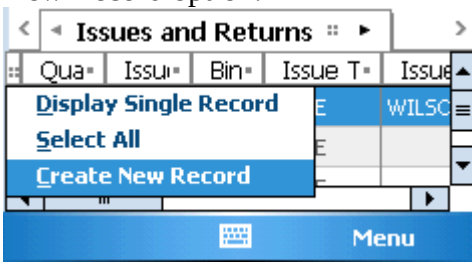
Detail Tabs	
	Users can access the detailed data for the selected item by tapping on the arrow keys on either side of the client display screen. The different tabs will be displayed. Tap on a particular tab to select it. 1. Balances 2. Issues and Returns 3. Transfers 4. Where Used The tab will be displayed in bold.

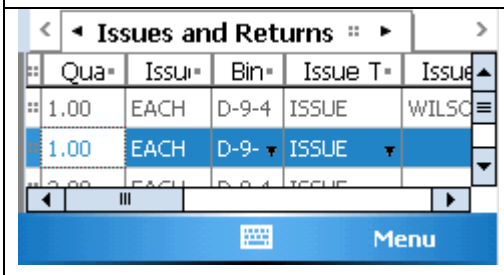
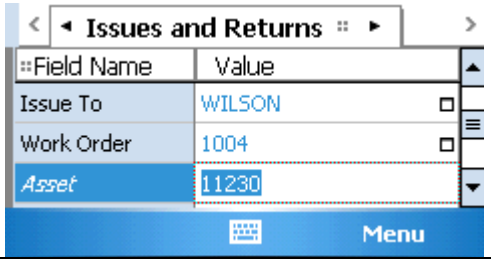
Balances

Entering a Physical Count	
	To enter a physical count, edit the **New Count** field by entering the quantity of the count into the value cell. This can only be performed if the user has the proper permissions to do so in Maximo. Tap on the Filter button to return to the filter screen to search for more items. Or, user can scan the item barcode to automatically search for that item.

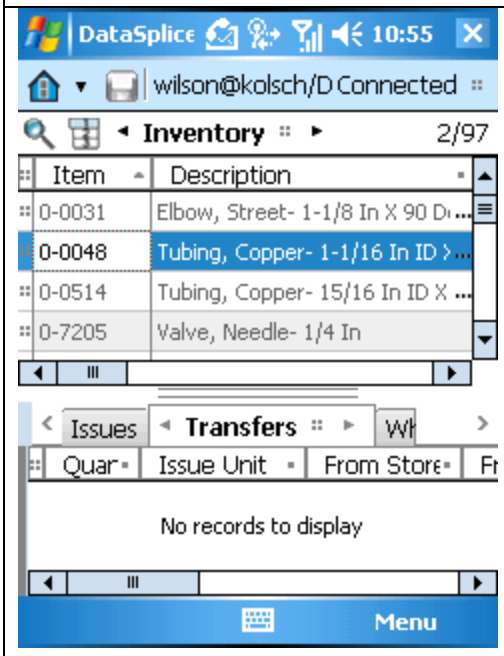
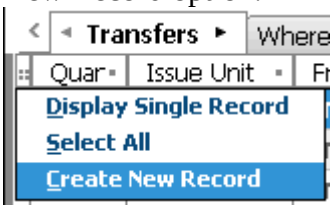
Adjusting Current Balance	
	To adjust the current balance, edit the **Current Balance** field by entering the desired quantity into the value cell. This can only be performed if the user has the proper permissions to do so in Maximo. Tap on the Filter button to return to the filter screen to search for more items. Or, user can scan the item barcode to automatically search for that item.

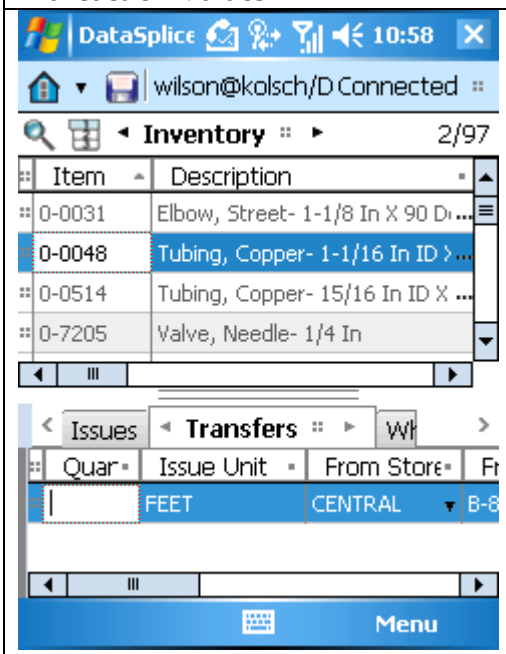
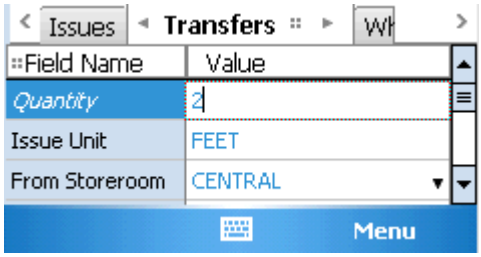
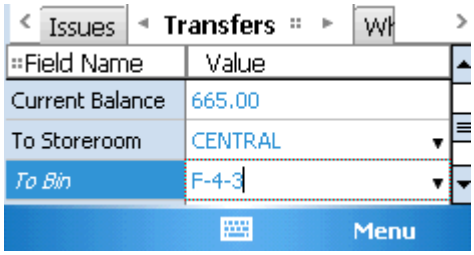
Issues and Returns

Create New Record	
	User can create a new issue or return record for the selected item. To access the Grid Menu, tap on the grid handle in the upper left corner of the data grid.  Using the Grid Menu, select the Create New Record option. 

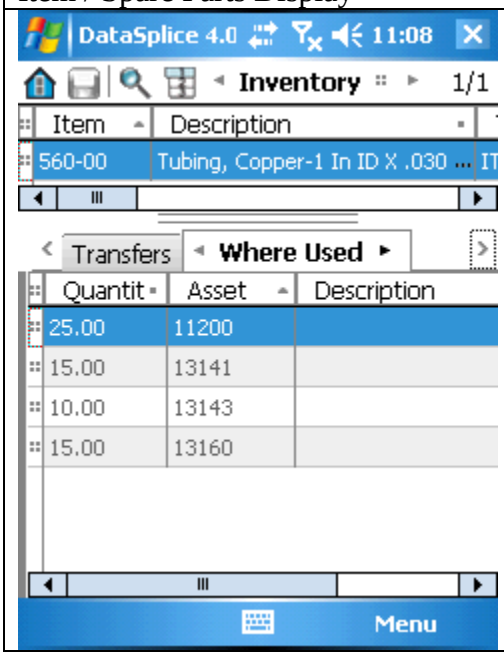
Transaction Values	
	DataSplice will insert the new record, into the grid, just below the record that had focus. Enter the desired values for Issue To, Work Order, Asset or Location. Note: at least one of these values must be specified. 

Transfers

Create New Record	
	User can create a new transfer record for the selected item. To access the Grid Menu, tap on the grid handle in the upper left corner of the data grid. Using the Grid Menu, select the Create New Record option. 

Transaction Values	
	DataSplice will insert the new record, into the grid, just below the record that had focus. Enter the desired values for Quantity, From Bin, To Storeroom, and To Bin.  

Where Used

Item / Spare Parts Display	
	This tab provides a read-only display of the assets that contain the selected item in their spare parts list.

Inventory Transfer

Description

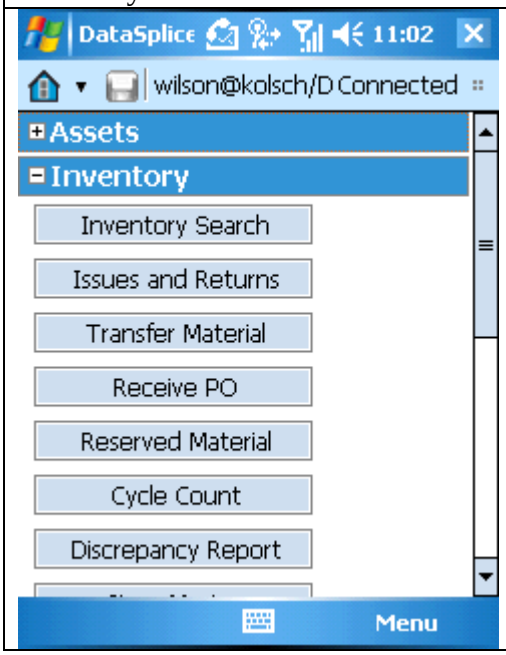
Inventory Transfer is a view designed for transferring inventory items to different bin and / or storeroom locations.

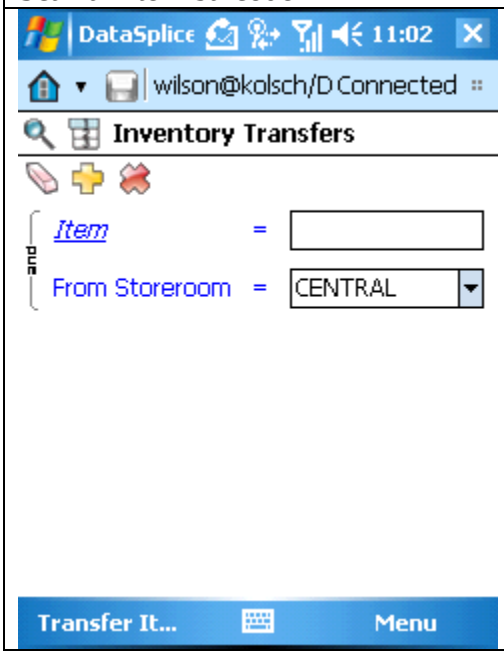
Fields

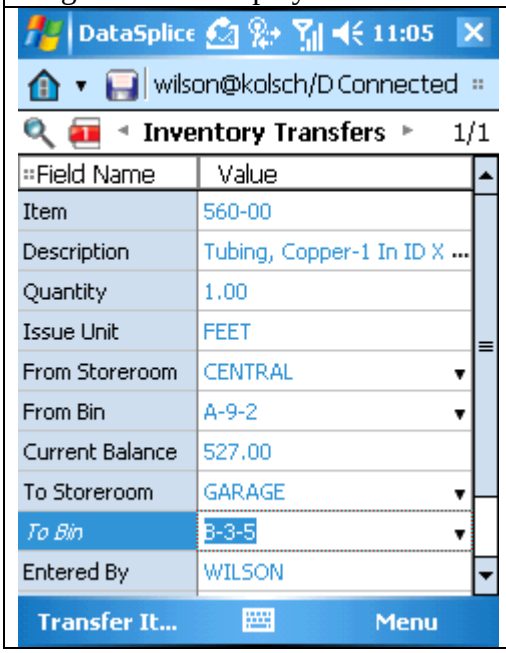
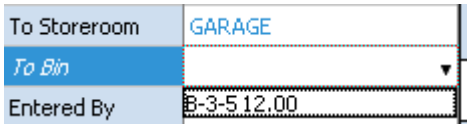
Below is a listing of the fields included in this view.

Field Name	Description
Item	The identification number of the item being issued.
Quantity	The quantity of the chosen item to be issued.
From Bin	The bin the item will be issued from.
From Store	The storeroom the item will be issued from.
To Bin	The bin the item will be issued to.
To Store	The storeroom the item will be issued to.

Using the View

Inventory View	
	To access the **Inventory Transfer** screen, tap on the ***Transfer Material*** button on the Home Screen.

Scan an Item barcode	
	To transfer an item, scan the item's barcode label. A transfer record will be created.

Single Record Display / Edit Mode	
	A new transfer transaction is started based on the select item. Enter the Quantity (number of items) being transferred, and select the correct From Bin and To Bin values. If transferring to another storeroom, pick the To Storeroom value before selecting the To Bin. To Bin and To Storeroom values will have a drop-down selection available. 

Issues and Returns

Description

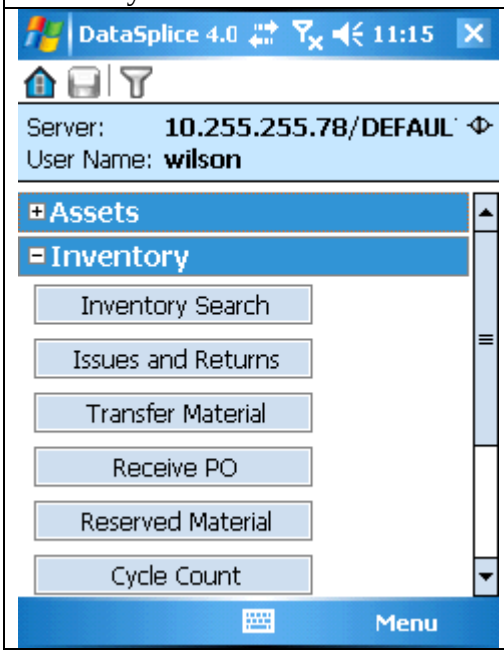
Issue and Returns is a view designed to easily issue or return material to/from a work order, general ledger account, location, or asset.

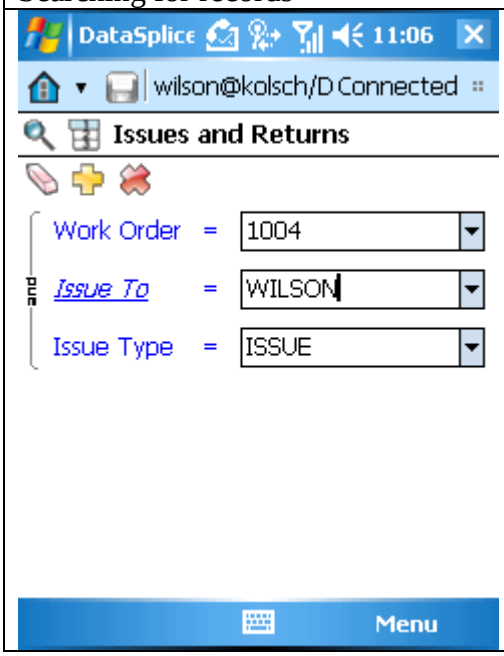
Fields

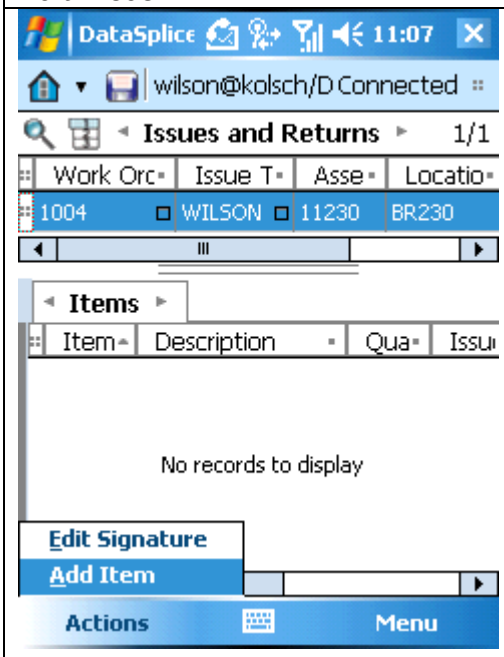
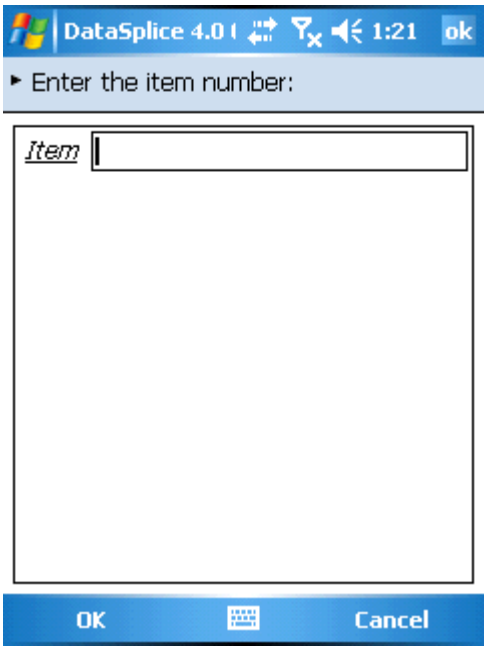
Below is a listing of the fields included in this view.

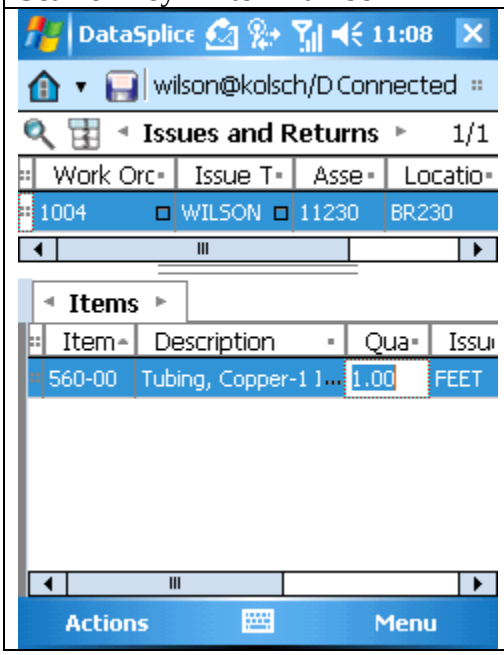
Field Name	Description
Item	The unique identifier for a piece of inventory in the system.
Description	Description of the item in question.
Quantity	The current balance since the last reconciliation.
Issue Unit	The unit of measure used when referring to the quantity of this item.
Issue Type	ISSUE or RETURN
Storeroom	Physical storeroom where the item is located.
Bin	Physical bin where the item is located.
Issue To	The labor code to issue this unit to.
Asset	The asset number related to this transaction.
Work Order	The work order related to this transaction.
Location	The location related to this transaction.
GL Account	The general ledger account related to this transaction.
Date	The date and timestamp of this transaction.

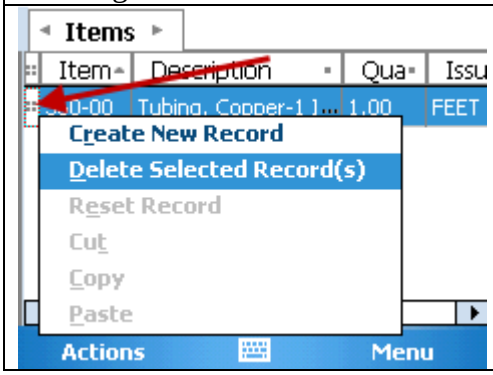
Using the View

Inventory View List	
	To access the **Issues and Returns** screen, tap on the button with the stylus.

Searching for records	
	The Issue and Returns screen initially displays a predefined filter for starting an issue transaction. Key in, or scan, the desired **Work Order and Issue To** and then hit the **Enter** key. If returning an item, change the ***Issue Type*** to RETURN by selecting it from the drop-down prior to starting the transaction.

Edit Mode	
	Scan the 1st item to issue to the specified work order. If a barcode is not available, users can tap on the "Add Item" Add Item menu in the lower left corner. A prompt is displayed where the user can "key-in" the desired item number.  Tap on OK to continue.

Scan or Key-in Item number	
	A new transaction is started. Enter the Quantity (number of items) being issued/returned. To issue additional items, simply scan the next barcode. Or, tap on the Add Item menu and key-in the item number. Another issue/return record will be created. Tap on the Filter button to return to the filter screen to issue/return to a different work order.

Deleting Records	
	If the wrong part is scanned, or the user keys-in the wrong item number, the record can be deleted by “tapping” on the record handle (located at the left edge of the record) and selecting Delete Selected Record from the pop-up menu.

Purchase Order Receiving

Description

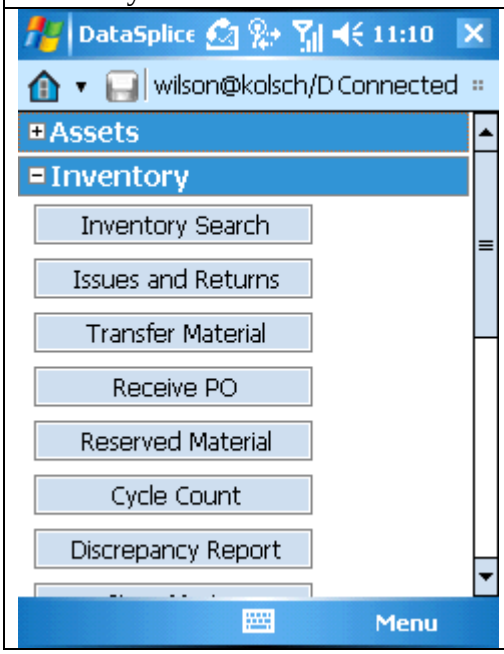
Purchase Order Receiving is a view designed to easily receive inventory items from incoming purchase orders.

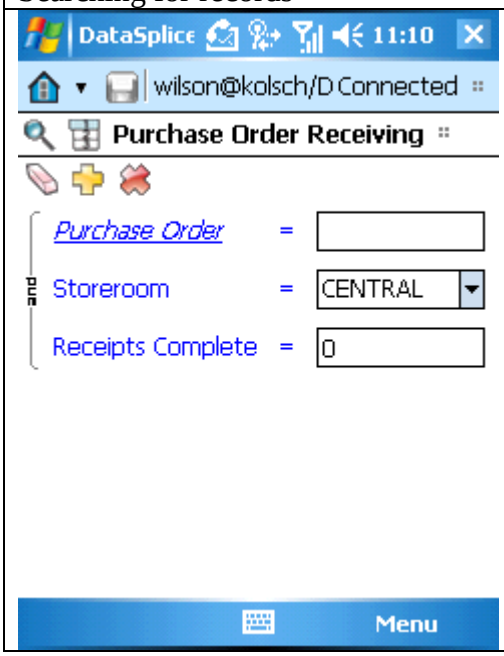
Fields

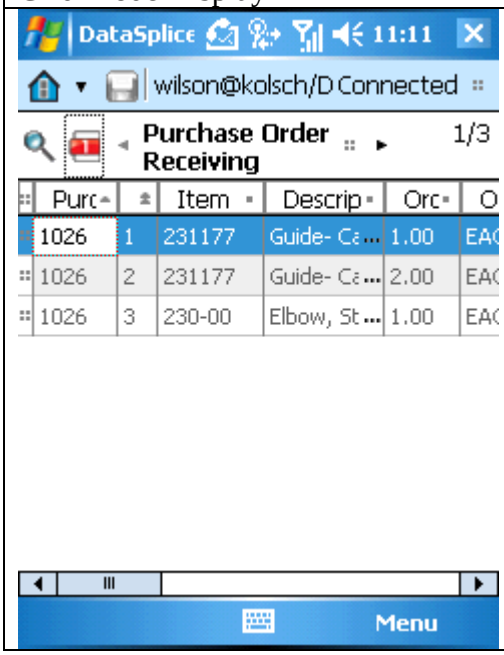
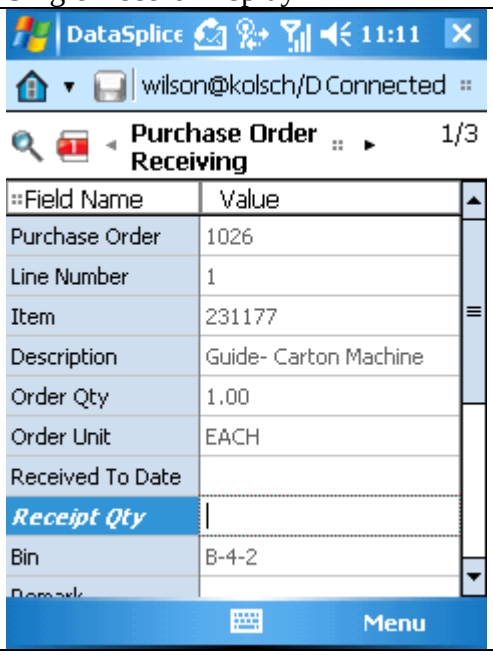
Below is a listing of the fields included in this view.

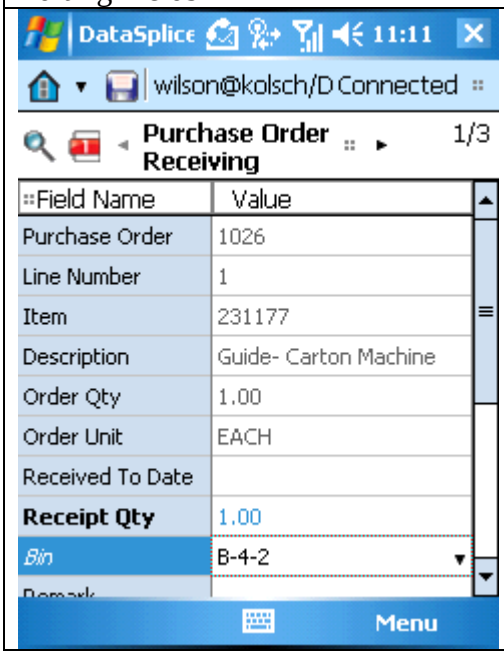
Field Name	Description
Purchase Order	The purchase order number.
Status	Status of the PO. APPR, COMP, etc…
Line Number	The unique identifier purchase order line.
Item	The unique identifier for a piece of inventory in the system.
Quantity Received	The quantity to receive.
Quantity Rejected	The quantity rejected.
Packing Slip	The packing slip for this receipt.
Reject Code	The reject code, if any, for this receipt.
Storeroom	Physical storeroom where the item is located.
Bin	Physical bin where the item is located.
Remark	The description set by user.
Description	Description of the item ordered.
Order Quantity	Amount of items ordered.
Order Unit	Unit of Measure for ordered qty.
Total Quantity	Amount of items received.
Total Rejected	Amount of items rejected.
Catalog Code	Catalog code.
Model Number	The model identifier of this item.
Manufacturer	Manufacturer of this item.
Location	The associated location.
Asset	The associated piece of equipment.
Work Order	The associated work order.

Using the View

Inventory View List	
	To access the **Purchase Order Receiving** screen, tap on the ***Receive by PO*** button on the home screen.

Searching for records	
	The Purchase Order Receiving screen initially displays a predefined filter for PO Line searches based on PO number and Receipts Complete. Key in, or scan, the desired values to search on then hit the "Enter" key. Optionally, you can tap on either of the display mode toolbar buttons: Display results in Grid Mode. Display results in Single Record Mode.

Grid Mode Display	Single Record Display
	

Editing Fields	
	There are 3 editable fields on this screen: 1. Receipt Qty–The amount / quantity currently being received. 2. Bin 3. Packing Slip Enter the Receipt Qty, and the Bin where the parts is being put away. If this is a direct issue item, Bin is not needed.

Reserved Material

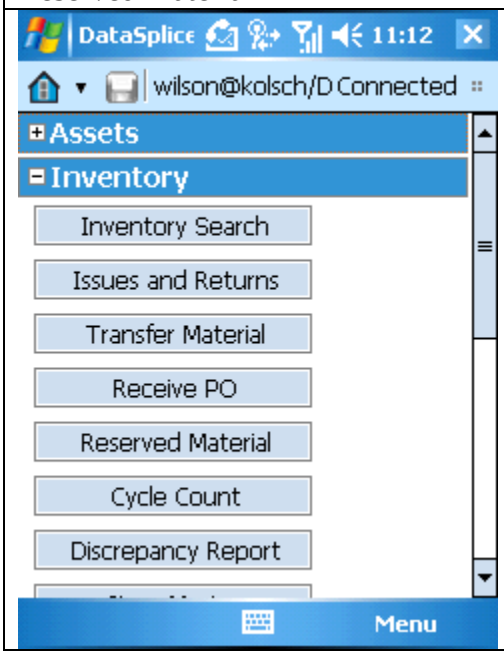
Description

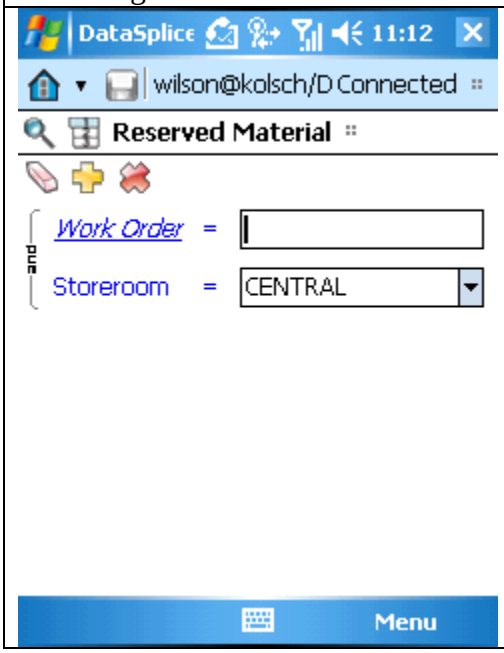
The Reserved Material screen provides the user with a list of items that have been "reserved" for particular work orders. From this list, users can issue the desired items by enter the "picked qty" for each line item.

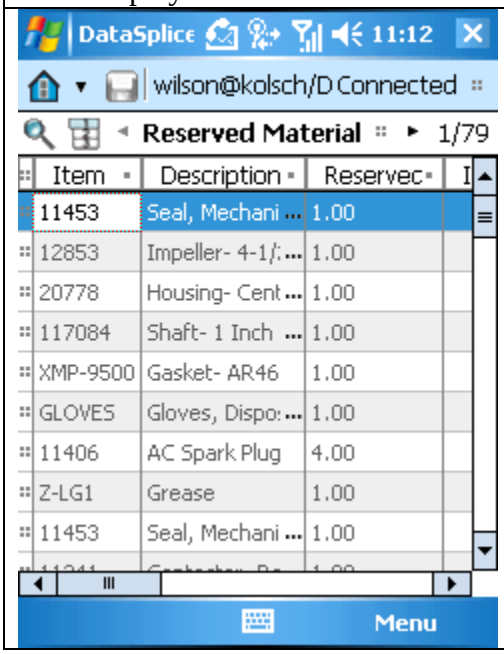
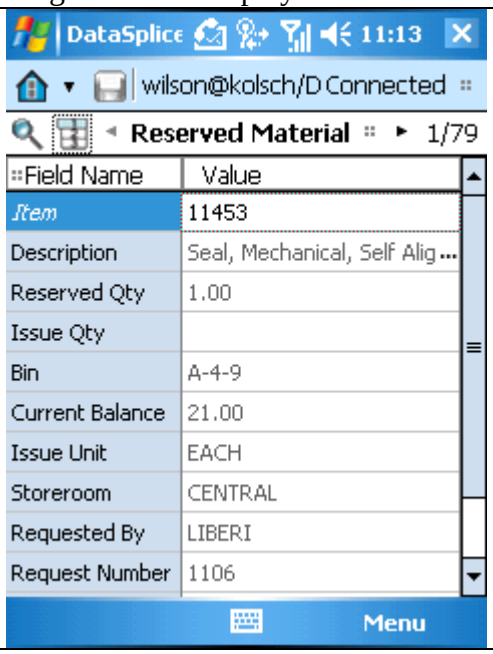
Fields

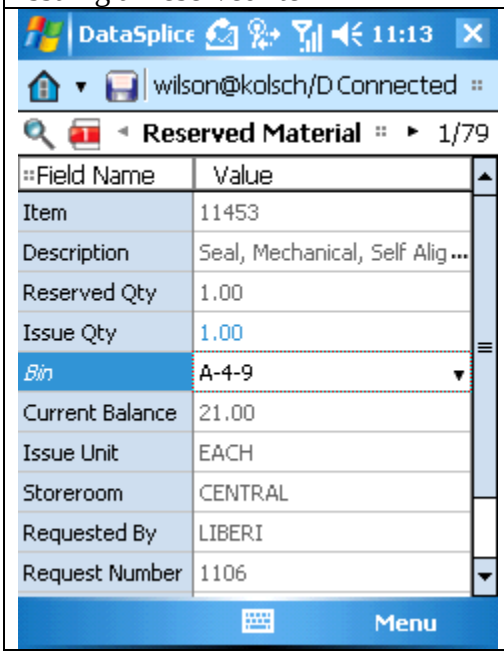
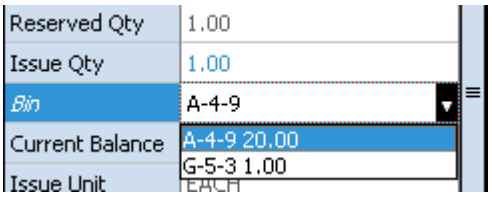
Field Name	Description
Item	The inventory item number
Description	The description for the item
Reserved Qty	How many of this item has been reserved
Actual Qty	How many of this item has already been issued
Bin	The bin location for the item (for this particular issue)
Issue Unit	The unit of measure, example: EACH
Storeroom	The storeroom location where the item is located
Requested By	Who requested the item
Request Number	The request number
Work Order	The work order number (identifier)
SiteID	The SiteID for the work order

Using the View

Reserved Material	
	To access the Reserved Material screen, tap the button on the Home Screen.

Searching for Item Reservations	
	A search filter is displayed that can be used to find the desired item reservations. Users can search by work order to display a specific set of reserved items. Or, users can search by storeroom to display all the reservations for items in the specified storeroom. Key in, or scan, the desired values to search on then hit the "Enter" key. Optionally, you can tap on either of the display mode toolbar buttons: Display results in Grid Mode. Display results in Single Record Mode.

Grid Display	Single Record Display
	

Issuing a Reserved Item	
	To issue an item, enter the amount being issued in the **Issue Qty** field. Additionally, if the user is pulling the parts from a bin that is different from the one specified, they can key-in or select the correct bin location.  The current balance of the item for each bin is displayed in the drop-down value list.

Cycle Count

Description

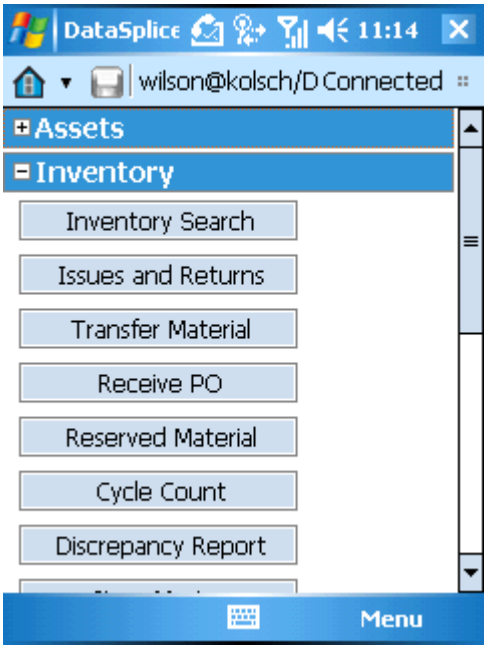
Cycle Count is a view designed for scanning item barcodes and entering new physicall counts. After a successful scan of an item, the record is unlocked and the user can enter a new physical count.

Fields

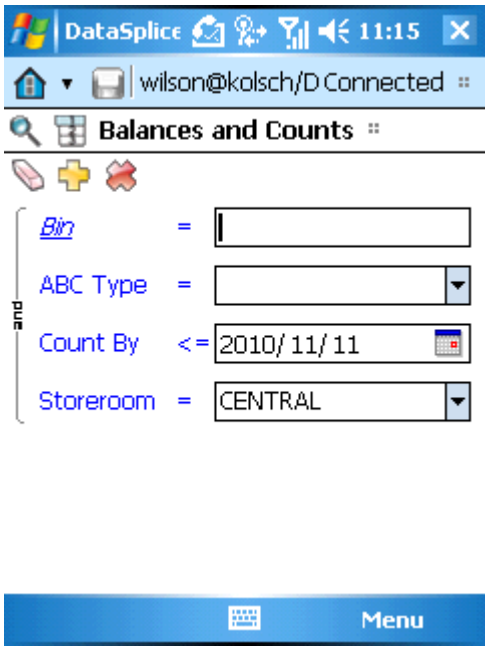
Below is a listing of the fields included in this view.

Field Name	Description
Item	The identification number of the item being issued.
Description	The item description.
New Count	Used to enter the value for physical counts.
Count Date	The date of the last count.
Storeroom	The storeroom location of the item.
Bin	The bin location within the storeroom.
Issue Unit	Unit of Measure for issues of the item.
Reconciled	Specifies if the item's last count has been reconciled.
ABC Type	Used in conjunction with count frequency. Determines how often to count the item.

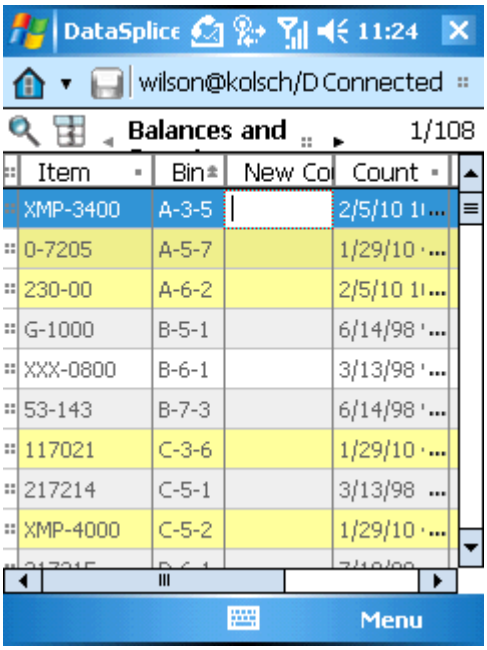
Using the View



▶ **USE**: To perform a guided cycle count based on items due to be counted by a specific date based on their count frequency and last count date.
Select **Cycle Count** from the home screen to begin a cycle count.



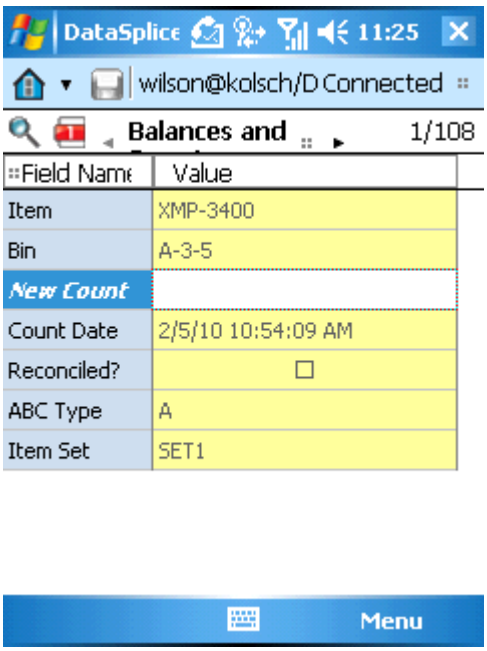
The search screen provides the ability to filter on a bin range and ABC type. To filter on a bin range, enter a bin value followed by a wildcard "%". For example, A%, would return all bins that start with "A". Otherwise, users can select an ABC type to filter on.



This displays the list of matching records sorted by bin so it is easier to walk down the isles and count the items.

Also notice that this process performs a *blind count*, so the current balance and physical count information in Maximo is not displayed.

Records displayed with a yellow background indicate an un-reconciled inventory item.



Enter the new physical count into the **New Count** field.

Use the **Next Record** and **Previous Record** buttons in the toolbar (or the page up/down keys if available) to move through the list of records and enter new physical counts for the items.

Return to the main screen when finished.

Discrepancy Report

Description

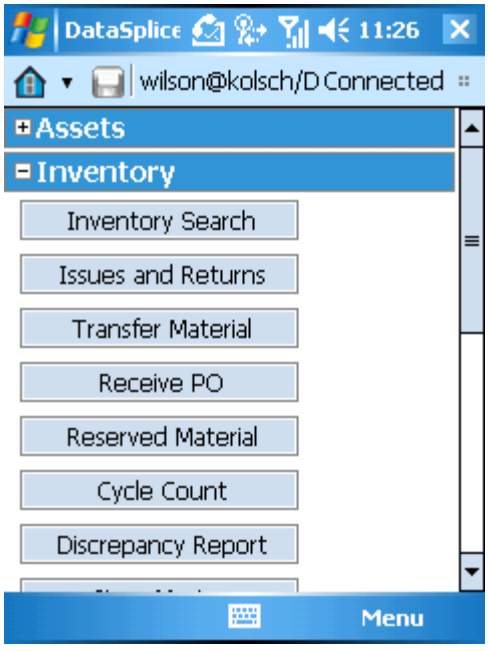
Discrepancy Report is a view designed to display the unreconciled counts for the specified storeroom.

Fields

Below is a listing of the fields included in this view.

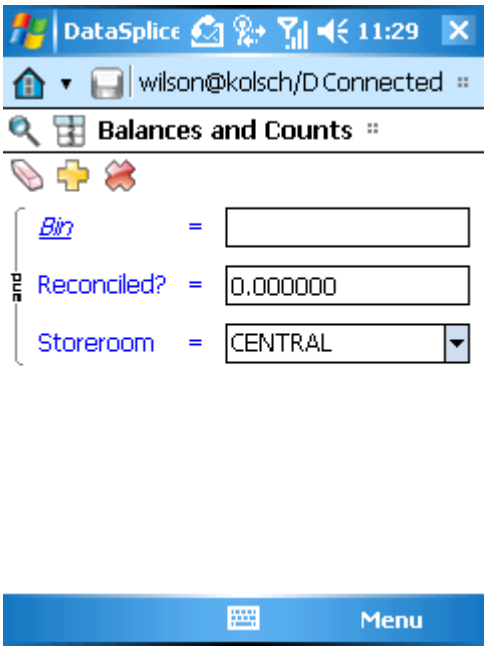
Field Name	Description
Item	The identification number of the item being issued.
Description	The item description.
New Count	Used to enter the value for physical counts.
Count Date	The date of the last count.
Storeroom	The storeroom location of the item.
Bin	The bin location within the storeroom.
Issue Unit	Unit of Measure for issues of the item.
Reconciled	Specifies if the item's last count has been reconciled.
ABC Type	Used in conjunction with count frequency. Determines how often to count the item.

Using the View

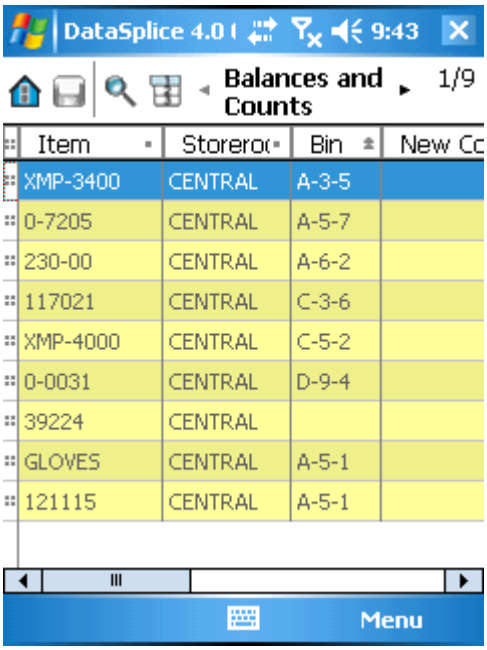


▶ **USE**: To re-count items with balance discrepancies prior to reconciling the balance.

This works essentially the same as the ***Cycle Count*** process. Select the **Discrepancy Report** button from the home screen.



Select the desired storeroom to query on and hit the "Enter" key.



This will display the list of non-reconciled items sorted by ABC Type and Bin. Notice that all the records are colored yellow, indicating the last count was not reconciled.

Enter a count into the **New Count** field.

Use the **Next Record** and **Previous Record** buttons in the toolbar (or the page up/down keys if available) to move through the list of records and enter new physical counts for the items.

Return to the main screen when finished.

Work Orders

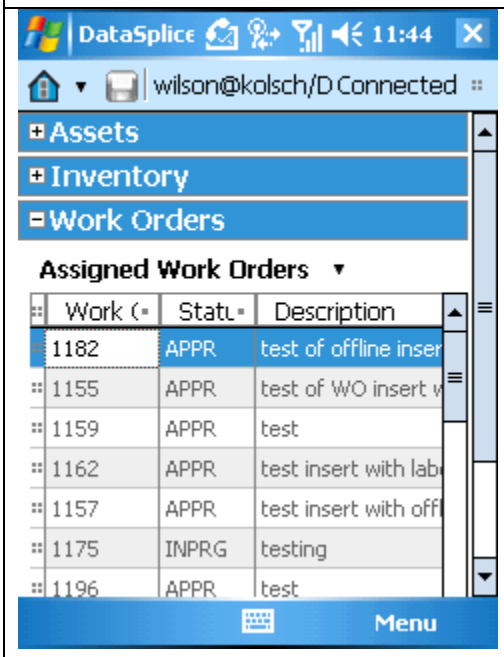
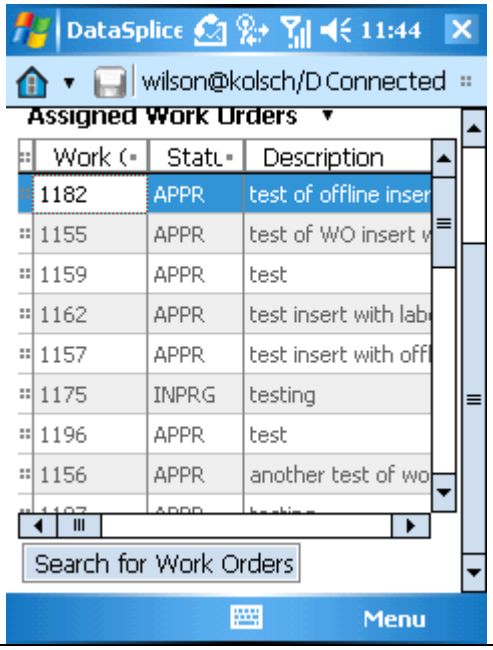
Description

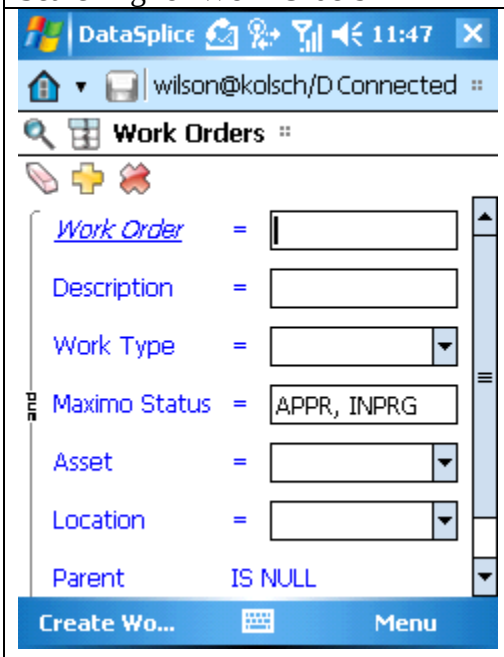
This mobile screen allows users to search, modify and create work orders. The ability to modify and create work orders depends upon a user's access rights in Maximo.

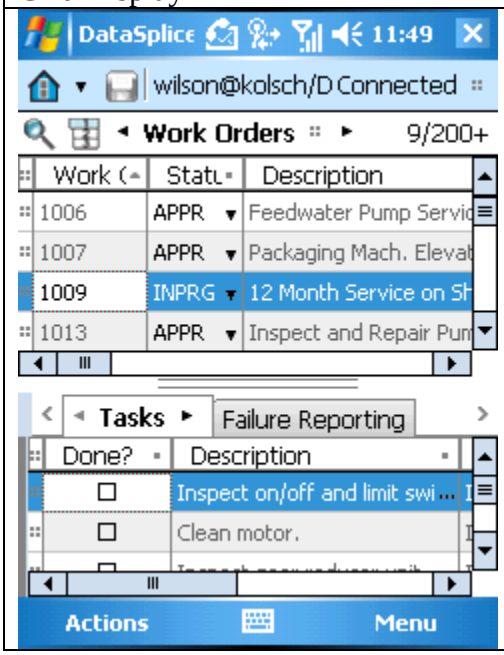
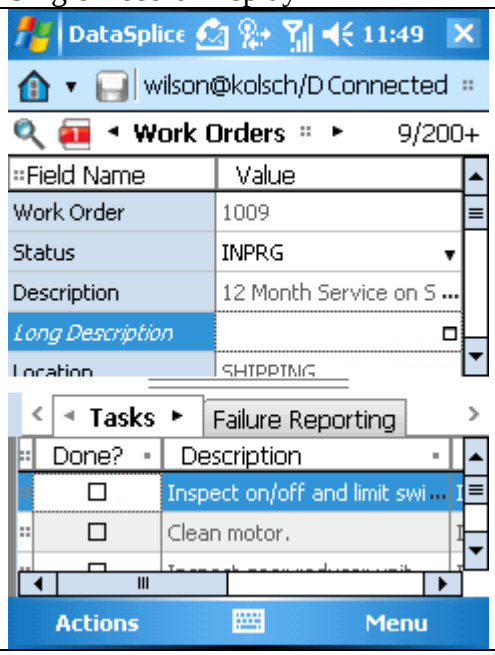
Fields

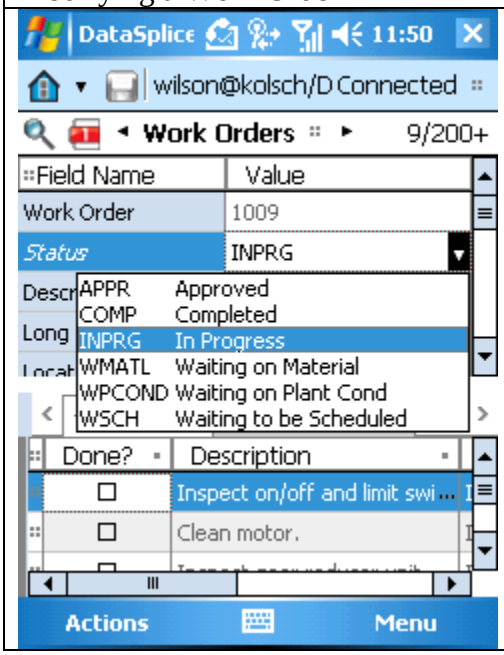
Field Name	Description
Work Order	The work order number
Status	The status of the work order
Description	The work order's description
Long Description	The work order's long description. (associated to the description)
Location	The work order's location
Location Description	Description of the Location
Asset	The work order's asset number
Asset Description	Description of the Asset
Priority	Designated priority for this work order.
Failure Code	Designated failure classification for this work order. This value is usually determined by the Asset or Location.
Problem Code	The code that represents the "Problem", within the failure class hierarchy, that is tied to this work order.
Work Type	The type of work order; PM, CM, EM
Lead	The lead person associated with this work order
Supervisor	The supervisor associated with this work order
Report Date	The date the work order was created
Targ Start Date	The date the work is targeted to begin (used by PMs)
Sched Start	The date the work is scheduled to begin (used by Assignment Mgr)
SiteID	
Parent	The work order's Parent, if the work order is part of a route or project or is a task
Has Children?	Check box indicates if this work order is a parent
Reported By	The person (ID) who created this work order
Crew	The crew associated with this work order

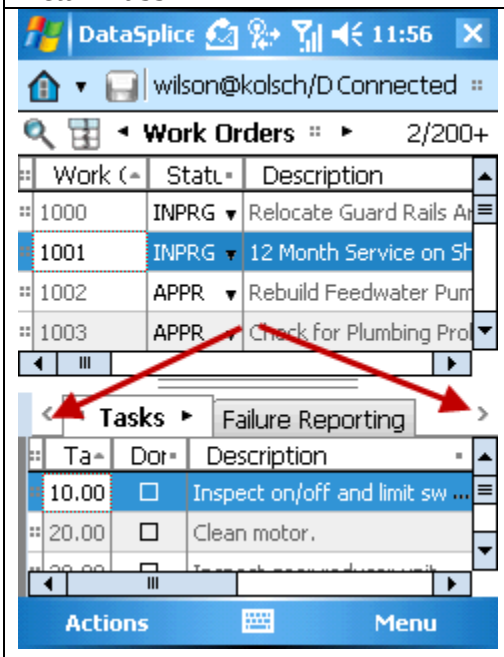
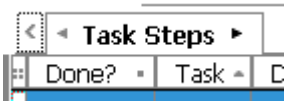
Using the View

Work Orders	
	To access the **Work Orders** screen, tap on the ***Search for Work Orders*** button on the Home Screen. It is located below the Assigned Work Orders data grid. Or, double-tap on the desired work order from the list. 

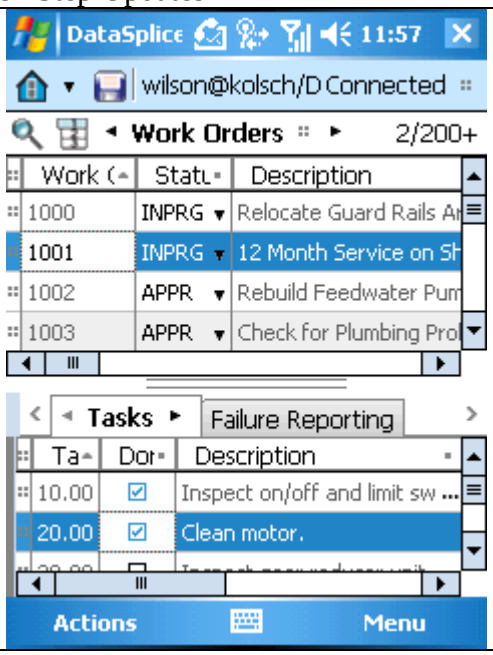
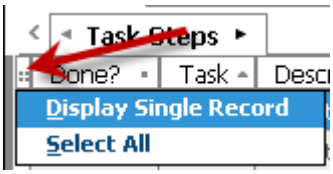
Searching for Work Orders	
	When users select the "Search for Work Orders" button, a search filter is displayed that can be used to find the desired work orders. Users can search by work order to display a specific record. Or, users can search by Lead, Status, Asset, or Location. By default, the filter is setup to search by Lead and Status. Key in, or scan, the desired values to search on then hit the "Enter" key. Optionally, you can tap on either of the display mode toolbar buttons: Display results in Grid Mode. Display results in Single Record Mode.

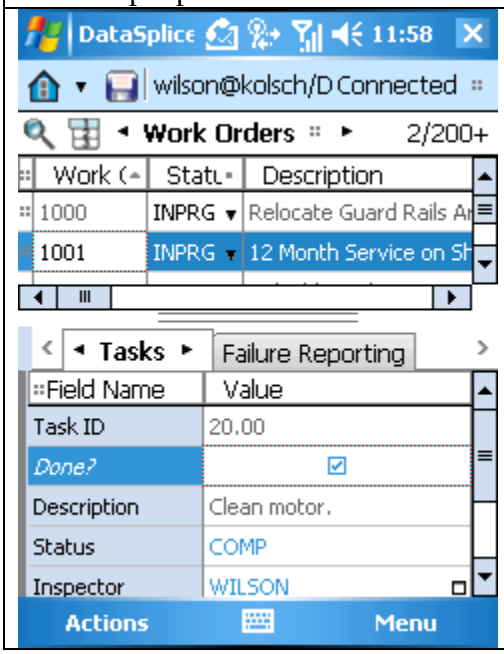
Grid Display	Single Record Display
	

Modifying a Work Order	
	The work order record can be updated by selecting a different **Status** value from the drop-down, updating the **Long Description**, or changing the **Lead**. Additional updates can be made by selecting the desired detail tab and modifying the associated data.

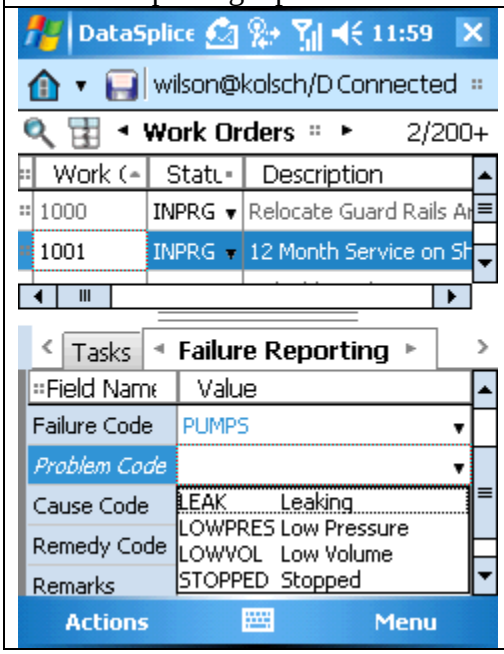
Detail Tabs	
	Users can access the detailed data for the selected work order by tapping on the arrow keys on either side of the client display screen. The different tabs will be displayed. Tap on a particular tab to select it. 1. Tasks 2. Failure Reporting 3. Labor Reporting 4. Material Usage 5. Planned Material 6. Work History The tab will be displayed in bold. 

Task Steps

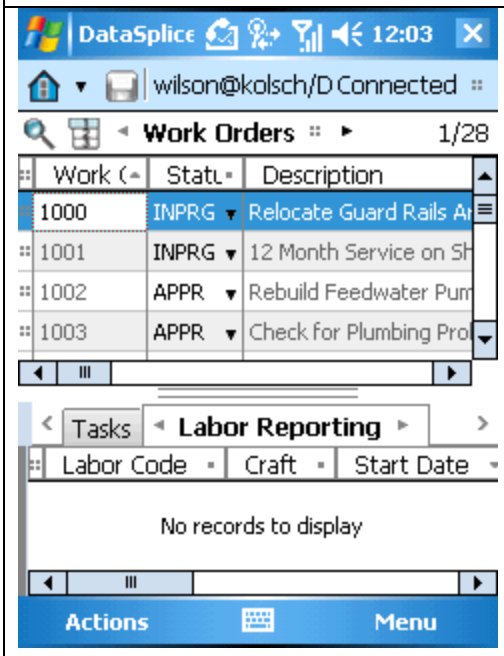
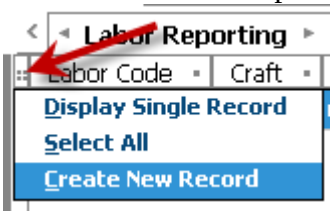
Task Step Updates	
	Users can indicate a task is completed by checking the **Done?** checkbox. To view the tasks individually, users can tap on the detail grid handle to open the available menu. 

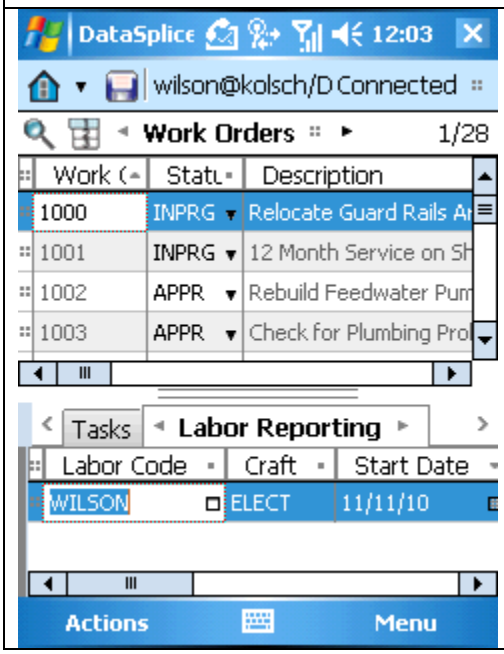
Task Step Updates	
	In addition to the **Done?** checkbox, user can enter **Observation** and **Measurement Value**. If there is an associated measure point, the new measurement and/or observation will be saved and can be viewed in the standard Condition Monitoring area within Maximo.

Failure Reporting

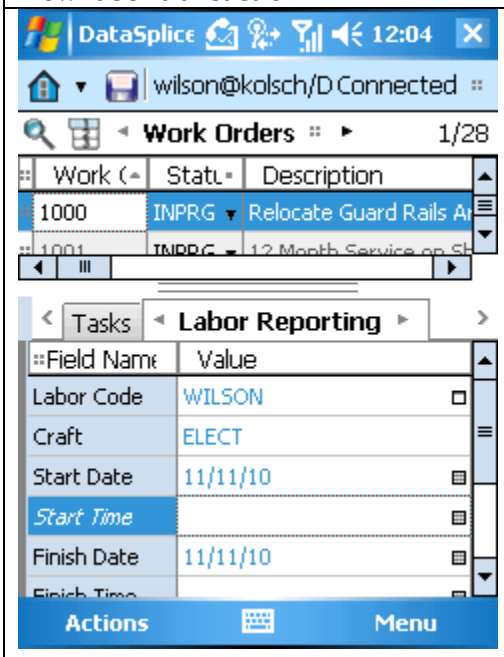
Failure Reporting Updates	
	The **Failure Reporting** tab is where the user can specify the Problem / Cause / Remedy reporting for the work order. There is a a drop-down list for each of the 4 fields. Once the user has entered a **Failure Code**, the **Problem Code** becomes editable. After selecting a **Problem Code**, the **Cause Code** can be selected, and so on. Each of the value lists, with the exception of **Failure Codes**, is dependent on the previous value selected. Additionally, users can enter **Remarks** by typing free-form text into the field.

Labor Reporting

Create new labor transaction	
	Select the Labor Reporting tab to display the labor transactions reported for the current work order. To create a new labor entry, user can perform one of the following steps; Using the grid menu, select the **Create New Record** menu option.  Or, using the **Actions** menu in the lower left corner, select the **Start Work** menu option.

Create new labor transaction	
	A new labor transaction is created. The new record will be inserted into the detail grid just after the record that had the current focus. To display the new record in “Single Record View”, tap on the grid handle (upper left corner of grid) and select the **Display Single Record** option.

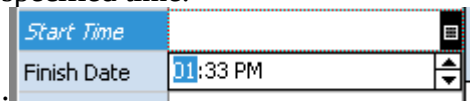
New labor transaction



Enter the **Start Time** and **Hours**, **Finish Time** and **Hours**, or **Start Time** and **Finish Time**. Based on the combination of values entered, DataSplice will calculate the third value.

When entering a date value, use the calendar control to select the date. When ready, hit the "Enter" key to populate the field with the specified date.

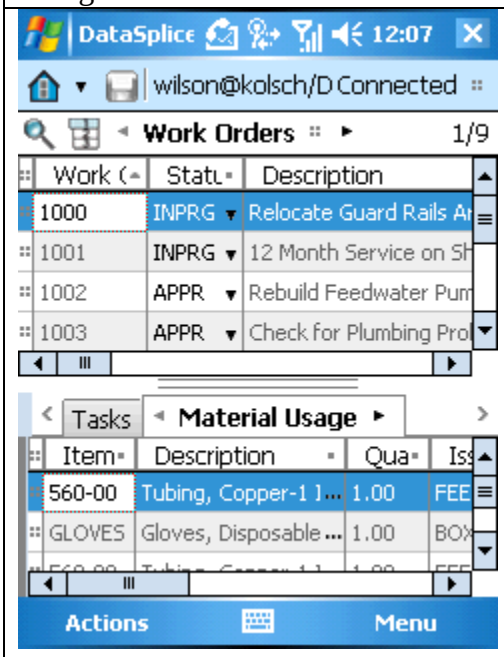
When entering a time, enter the desired hours and minutes. When ready, hit the "Enter" key to populate the field with the specified time.

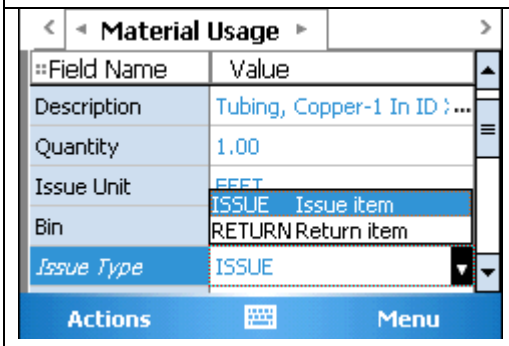
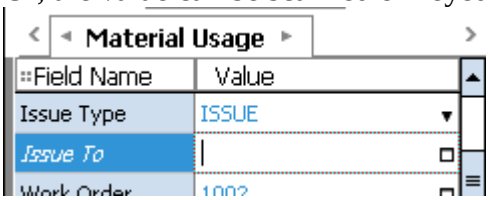


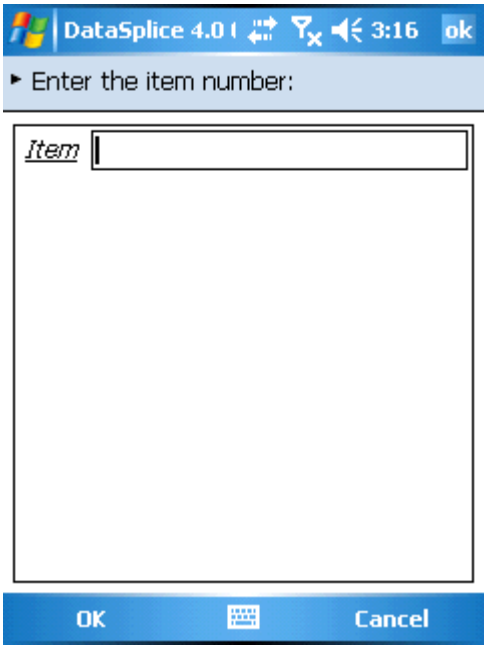
If the **Start Work** menu option was used to create the labor transaction, then the user can use the **Stop Work** menu option to complete the labor transaction entry. The **Stop Work** menu option will NOT be available if the **Start Work** option wasn't used.

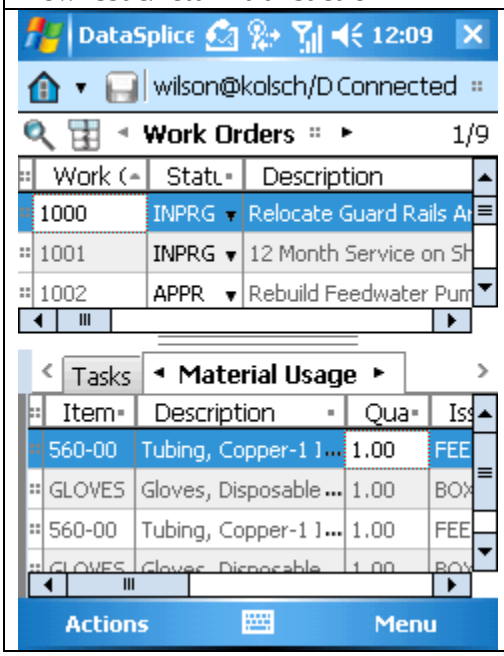
Material Usage

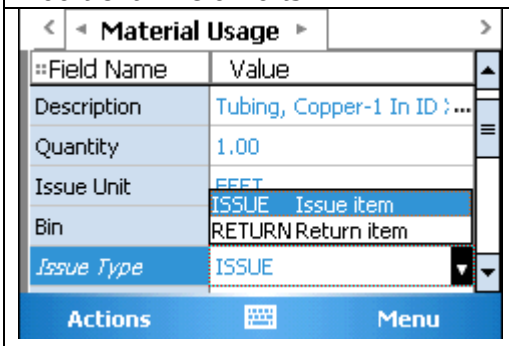
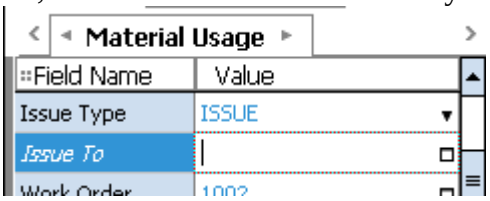
The Material Usage tab can be used to issue or return items to a work order. Also, this detail tab will display any items previously issued to the selected work order. The following sections illustrate the two methods to create a new issue/return transaction.

Using the Barcode Scanner	
	The first, and easiest, method for creating issue transactions is to use an integrated barcode scanner. When the **Material Usage** tab has focus, and an Item barcode is scanned, DataSplice will create a new issue transaction for the scanned item. The work order, asset, and location values will be defaulted based on the selected work order. The **Quantity** field will default to 1.00. User can edit this value if issuing more then 1.00. If the Item barcode is scanned a 2nd time, DataSplice will increment the **Quantity** by 1.00. So, in this case the resulting **Quantity** would then be 2.00, and so on.

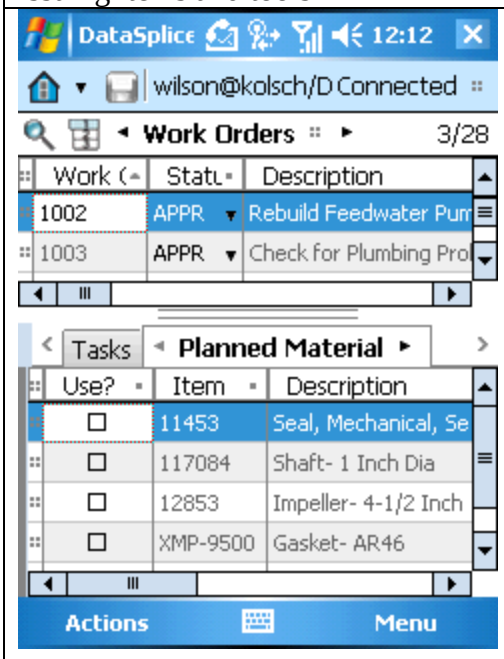
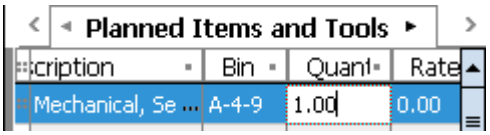
Additional Field Edits	
	After the **Quantity** has been specified, the user can select the **Bin** they are issuing from (or returning to). The **Issue Type** can be modified to indicate the transaction is a return or an issue. The type will default to ISSUE. The last field to modify, if needed, is **Issue To**. A pop-up value selection dialog is available to select the desired PersonID. Or, the value can be scanned or keyed in. 

Using the Actions Menu -> Add Item	
The second method for creating issue transactions is to use the Actions menu in the lower left corner of the client display screen. 	When the Add Item menu option is selected, the user is prompted for the item number.  After the number is entered, tap on "OK" or hit the enter key.

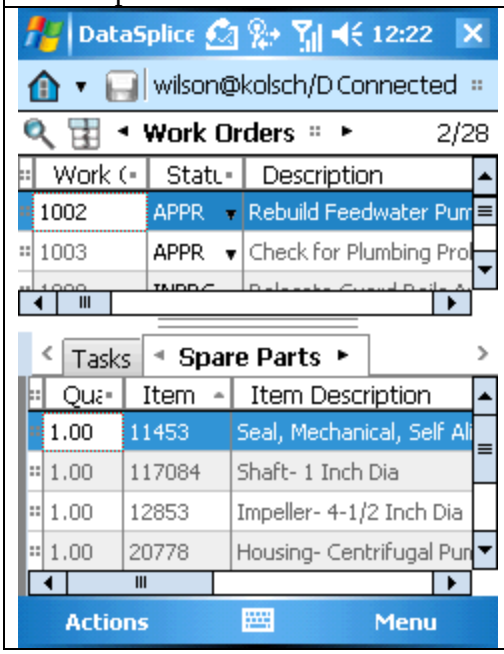
New issue/return transaction	
	DataSplice will create a new issue transaction for the entered item. The work order, asset, and location values will be defaulted based on the selected work order. The **Quantity** field will default to 1.00. User can edit this value if issuing more then 1.00. If the Item barcode is scanned a 2nd time, DataSplice will increment the **Quantity** by 1.00. So, in this case the resulting **Quantity** would then be 2.00, and so on.

Additional Field Edits	
	After the **Quantity** has been specified, the user can select the **Bin** they are issuing from (or returning to). The **Issue Type** can be modified to indicate the transaction is a return or an issue. The type will default to ISSUE. The last field to modify, if needed, is **Issue To**. A pop-up value selection dialog is available to select the desired PersonID. Or, the value can be scanned or keyed in. 

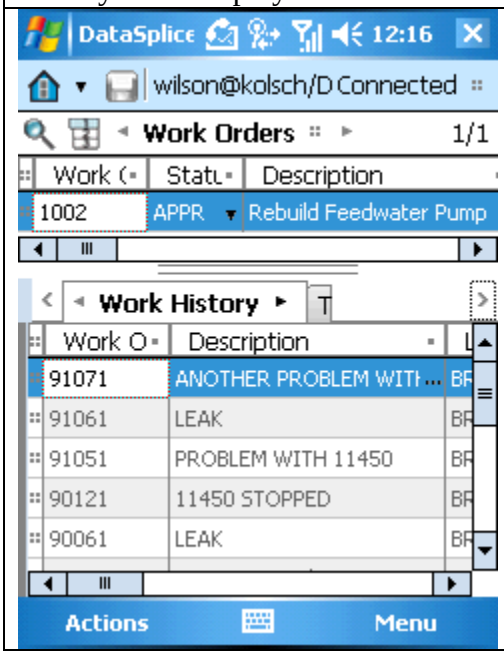
Planned Material

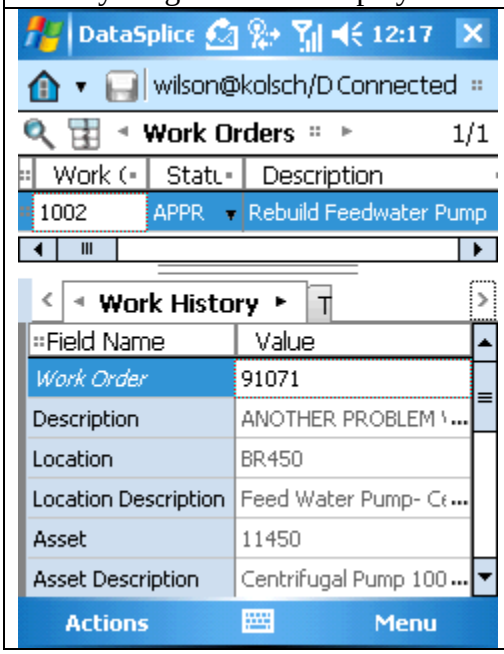
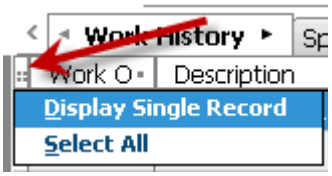
Issuing items and tools	
	The Planned Items and Tools tab allow the user to view and issue materials and tools for the current work order. To issue one of the displayed items or tools, perform the following steps; Check the **Use?** checkbox Update the **Quantity** field to reflect the actual issued amount.  Users can scroll the grid to the right, or view the data grid on Single Record mode to see the **Quantity** field.

Spare Parts

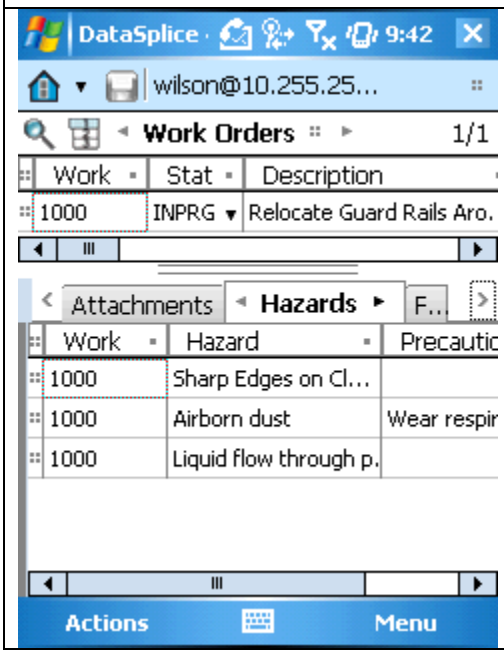
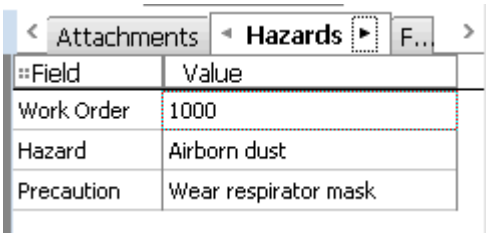
Asset Spare Parts	
	The Spare Parts tab displays the list of items from the associated asset's spare parts.

Work History

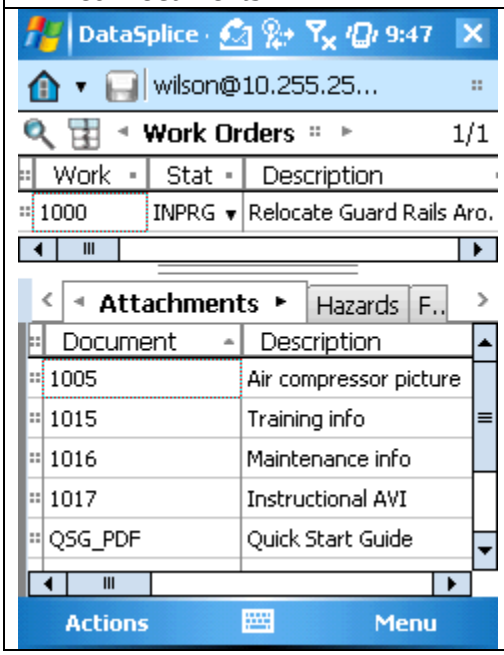
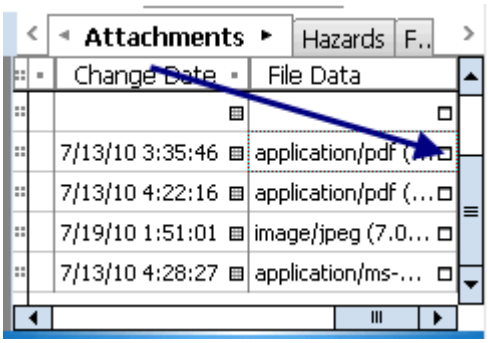
History Grid Display	
	The Work History tab is a read-only display of the historical work orders for the associated asset on the selected work order.

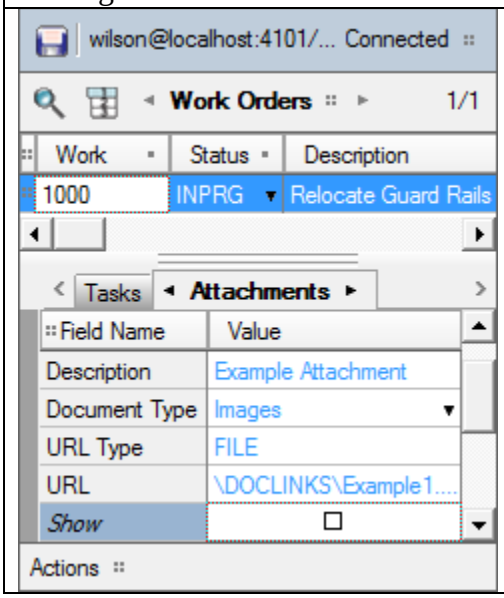
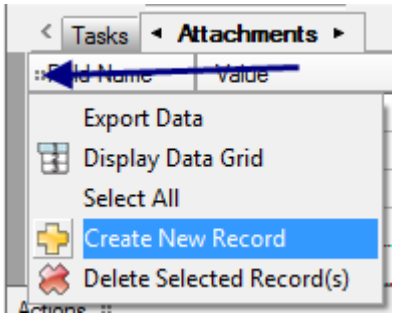
History Single Record Display	
	Use the grid menu to select the Single Record Display to view more details about a particular history work order. 

Hazards and Precautions

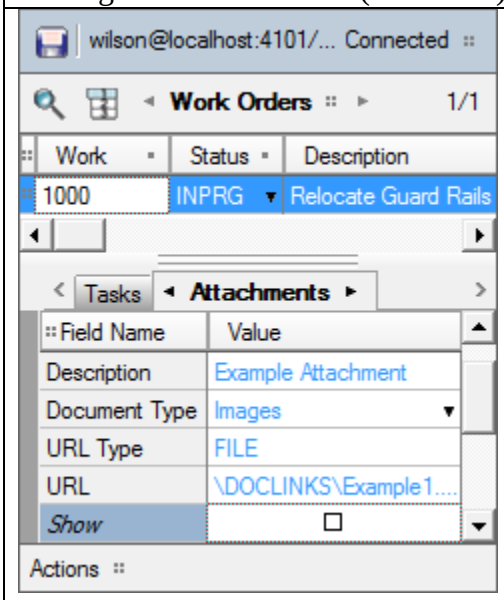
Hazards & Precautions	
	The Hazards & Precautions tab is a read-only display of the safety related hazards for the selected work order. The three columns of data show the work order number, hazard, and precaution (if specified). 

Attachments

Linked Documents	
	The **Attachments** tab displays the list of linked documents associated with the selected work order. In the **File Data** column, users can tap on the dialog icon to open the attached document. 

Adding a File Attachment	
	To add an attachment, open the grid menu and select **Create New Record**.  Add new record is added to the list.

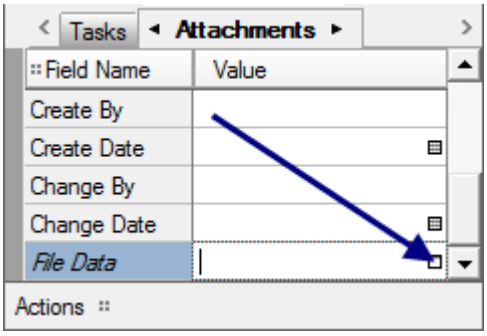
Adding a File Attachment (continued)



Enter the following values;

Description
Document Type
URL Type
URL

And select the target file to add using the open dialog icon in the File Data field.



After selecting the file, the File Data field will display the application type of the file selected.